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*** It is now 5/20/08 2:54:27 PM ***

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- French Patents (File 371)
- German Patents Fulltext (File 324)
- IMS Patent Focus (File 447, 947)
- INPADOC/Family and Legal Status (File 345)
- JAPIO - Patent Abstracts of Japan (File 347)
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- U.S. Patents Fulltext (1976-present) (File 654)
- WIPO/PCT Patents Fulltext (File 349)
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DialogLink 5 Release Notes

New features available in the latest release of DialogLink 5 (August 2006)

- Ability to resize images for easier incorporation into DialogLink Reports
- New settings allow users to be prompted to save Dialog search sessions in the format of their choice (Microsoft Word, RTF, PDF, HTML, or TEXT)
- Ability to set up Dialog Alerts by Chemical Structures and the addition of Index Chemicus as a structure searchable database
- Support for connections to STN Germany and STN Japan services

Show Preferences for details

? Help Off Line

* * *

Connecting to Rob Pond - Dialog - 264751

Connected to Dialog via SMS002201965

? B 15, 9, 610, 810, 275, 476, 624, 621, 636, 613, 813, 16, 160, 634, 148, 20, 35, 583, 65, 2, 474, 475, 99, 256, 348, 349, 347, 635, 570, PAPERSMJ, PAPERSEU, 47

>>>W: 476 does not exist

1 of the specified files is not available

[File 15] ABI/Inform(R) 1971-2008/May 19

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[File 9] Business & Industry(R) Jul/1994-2008/May 19

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[File 610] Business Wire 1999-2008/May 20

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**File 610: File 610 now contains data from 3/99 forward. Archive data (1986-2/99) is available in File 810.*

[File 810] Business Wire 1986-1999/Feb 28

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[File 275] Gale Group Computer DB(TM) 1983-2008/May 13
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[File 624] McGraw-Hill Publications 1985-2008/May 20
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**File 624: Homeland Security & Defense and 9 Platt energy journals added Please see HELP NEWS624 for more*

[File 621] Gale Group New Prod.Annou.(R) 1985-2008/May 01
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[File 636] Gale Group Newsletter DB(TM) 1987-2008/May 15
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[File 613] PR Newswire 1999-2008/May 20
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**File 613: File 613 now contains data from 5/99 forward. Archive data (1987-4/99) is available in File 813.*

[File 813] PR Newswire 1987-1999/Apr 30
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[File 16] Gale Group PROMT(R) 1990-2008/May 14
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**File 16: Because of updating irregularities, the banner and the update (UD=) may vary.*

[File 160] Gale Group PROMT(R) 1972-1989
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[File 634] San Jose Mercury Jun 1985-2008/May 16
(c) 2008 San Jose Mercury News. All rights reserved.

[File 148] Gale Group Trade & Industry DB 1976-2008/May 01
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[File 20] Dialog Global Reporter 1997-2008/May 20
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[File 35] Dissertation Abs Online 1861-2008/Nov
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[File 65] Inside Conferences 1993-2008/May 19
(c) 2008 BLDSC all rts. reserv. All rights reserved.

[File 2] INSPEC 1898-2008/Apr W3
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[File 474] New York Times Abs 1969-2008/May 20
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[File 475] Wall Street Journal Abs 1973-2008/May 19
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[File 99] Wilson Appl. Sci & Tech Abs 1983-2008/Apr
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[File 348] EUROPEAN PATENTS 1978-2007/ 200819
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[File 349] PCT FULLTEXT 1979-2008/UB=20080508|UT=20080501
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[File 347] JAPIO Dec 1976-2007/Dec(Updated 080328)
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[File 570] Gale Group MARS(R) 1984-2008/May 15
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[File 471] New York Times Fulltext 1980-2008/May 26
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[File 492] Arizona Repub/Phoenix Gaz 19862002/Jan 06
(c) 2002 Phoenix Newspapers. All rights reserved.

**File 492: File 492 is closed (no longer updating). Use Newsroom, Files 989 and 990, for current records.*

[File 494] St LouisPost-Dispatch 1988-2008/May 18
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[File 631] Boston Globe 1980-2008/May 17
(c) 2008 Boston Globe. All rights reserved.

[File 633] Phil.Inquirer 1983-2008/May 19
(c) 2008 Philadelphia Newspapers Inc. All rights reserved.

[File 638] Newsday/New York Newsday 1987-2008/May 18
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[File 703] USA Today 1989-2008/May 19
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[File 704] (Portland)The Oregonian 1989-2008/May 15
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[File 713] Atlanta J/Const. 1989-2008/May 18
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[File 714] (Baltimore) The Sun 1990-2008/May 18
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[File 715] Christian Sci.Mon. 1989-2008/May 19
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[File 725] (Cleveland)Plain Dealer Aug 1991-2008/May 19
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[File 735] St. Petersburg Times 1989- 2008/May 18
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[File 477] Irish Times 1999-2008/May 20
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[File 710] Times/Sun.Times(London) Jun 1988-2008/May 19
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[File 711] Independent(London) Sep 1988-2006/Dec 12
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[File 47] Gale Group Magazine DB(TM) 1959-2008/May 08
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minimiz??? or reduc?????))

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4794349	CHANNEL
7770690	SUPPLY
4325444	CHAIN
903786	SUPPLY(W)CHAIN
1855468	CONFLICT
791183	CONFLICTS
5326344	ELIMINAT????
1723440	MINIMIZ???
18042137	REDUC?????

S2 2150 S ((CHANNEL OR (SUPPLY(W)CHAIN)) (5N) (CONFLICT OR
CONFLICTS) (10N) (ELIMINAT???? OR MINIMIZ??? OR REDUC?????))

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or electronic(w)commerce)

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8208537 ONLINE
160 ON-LINE
11708577 INTERNET

126117552 ON
20084181 LINE
2579291 ON(W)LINE
89434 E-COMMERCE
18705278 E
5546384 COMMERCE
1710787 E(W)COMMERCE
9517916 ELECTRONIC
5546384 COMMERCE
680216 ELECTRONIC(W)COMMERCE

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(E(W)COMMERCE) OR ELECTRONIC(W)COMMERCE)

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E-TAILERS) AND (DISTRIBUTOR OR DISTRIBUTORS OR WHOLESALE OR WHOLESALE OR WHOLESELLER OR
WHOLESELLERS)

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221 S4
4575160 MANUFACTURER
4377545 MANUFACTURERS
3028494 SUPPLIER
2697343 SUPPLIERS
1665912 VENDOR
2385878 VENDORS
1743184 RETAILER
2635671 RETAILERS
851189 MERCHANT
652068 MERCHANTS
811847 SELLER
894895 SELLERS
15 E-TAILER

22 E-TAILERS
1563406 DISTRIBUTOR
1552074 DISTRIBUTORS
176906 WHOLESALER
176906 WHOLESALER
153 WHOSELLER
185 WHOSELLERS

S5 15 S S4 AND (MANUFACTURER OR MANUFACTURERS OR SUPPLIER OR SUPPLIERS OR
VENDOR OR VENDORS) AND (RETAILER OR RETAILERS OR MERCHANT OR MERCHANTS OR SELLER OR
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WHOLESALER OR WHOSELLER OR WHOSELLERS)

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S6 14 RD (UNIQUE ITEMS)

? t s14/free/all

>>>E: Set 14 does not exist

? t s6/free/all

>>>W: "FREE" is not a valid format name in file(s): 347-349

6/8/1 (Item 1 from file: 15)

ABI/Inform(R)

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02041352 55658001

USE FORMAT 7 OR 9 FOR FULL TEXT

Using value reengineering to implement breakthrough solutions for customers

Word Count: 5298 Length: 12 Pages

1999

Descriptors: Supply chains; Operations research; Studies; Customer relations; Supply & demand

Classification Codes: 9130 (CN=Experimental/Theoretical); 2600 (CN=Management science/Operations research)

Print Media ID: 37879

6/8/2 (Item 2 from file: 15)

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01340165 99-89561

****USE FORMAT 7 OR 9 FOR FULL TEXT****

Year in review part one: November 1995-February 1996

Word Count: 16507 Length: 26 Pages

Nov 18, 1996

Company Names:

Microsoft Corp (Duns: 08-146-6849 Ticker: MSFT)

IBM Corp (Duns: 00-136-8083 Ticker: IBM)

Apple Computer Inc (Duns: 06-070-4780 Ticker: AAPL)

Ingram Micro Inc

Netscape Communications Corp

Geographic Names: US

Descriptors: Year in review; High tech industries; Distribution channels; Trends; Internet; Market strategy;

Marketing agreements; Acquisitions & mergers; Manycompanies

Classification Codes: 9190 (CN=United States); 8302 (CN=Software and computer services); 8651 (CN=Computer industry); 7000 (CN=Marketing); 7400 (CN=Distribution); 2330 (CN=Acquisitions & mergers)

6/8/3 (Item 3 from file: 15)

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01128489 97-77883

****USE FORMAT 7 OR 9 FOR FULL TEXT****

Year in review - Part Two: May 1995-October 1995

Word Count: 13516 Length: 10 Pages

Nov 20, 1995

Company Names:

Microsoft Corp (Duns: 08-146-6849 Ticker: MSFT)

Novell Inc (Duns: 03-778-7298 Ticker: NOVL)

Compaq Computer Corp (Duns: 00-389-7733 Ticker: CPQ)

Intel Corp (Duns: 04-789-7855 Ticker: INTC)

IBM Corp (Duns: 00-136-8083 Ticker: IBM)

Geographic Names: US

Descriptors: Year in review; Value added resellers; Computer industry; Software industry ; Electronics industry;

Court decisions; Competition; Corporate reorganization; Manycompanies

Classification Codes: 8302 (CN=Software and computer services); 8651 (CN=Computer industry); 8650 (CN=Electrical & electronics industries); 4330 (CN=Litigation); 7000 (CN=Marketing); 2320 (CN=Organizational structure); 9190 (CN=United States)

6/8/4 (Item 4 from file: 15)

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01114569 97-63963

USE FORMAT 7 OR 9 FOR FULL TEXT

The coming electronic commerce (r)evolution

Word Count: 3600 Length: 8 Pages

Nov/Dec 1995

Geographic Names: US

Descriptors: Information technology; Retailing industry; Distribution channels; Business forecasts; Changes; Corporate planning; Internet

Classification Codes: 5200 (CN=Communications & information management); 7400 (CN=Distribution); 2310 (CN=Planning); 8390 (CN=Retailing industry); 9190 (CN=United States)

6/8/5 (Item 5 from file: 15)

ABI/Inform(R)

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00757293 94-06685

USE FORMAT 7 OR 9 FOR FULL TEXT

Strategic renewal in distribution

Word Count: 5417 Length: 10 Pages

1993

Geographic Names: US; Canada

Descriptors: Manycompanies; Wholesalers; Distribution channels; Growth; Studies

Classification Codes: 7400 (CN=Distribution); 8303 (CN=Wholesale industry); 9190 (CN=United States); 9140 (CN=Statistical data); 9172 (CN=Canada)

6/8/6 (Item 6 from file: 15)

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00646020 92-60960

USE FORMAT 7 OR 9 FOR FULL TEXT

Rethinking Concept Foundations in Logistics Management

Word Count: 11399 Length: 35 Pages

1992

Descriptors: Logistics; Decision making; Distribution planning; Functions; Models

Classification Codes: 5160 (CN=Transportation)

6/8/7 (Item 1 from file: 9)

Business & Industry(R)

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01696769 Supplier Number: 24451284 (USE FORMAT 7 OR 9 FOR FULLTEXT)

Compaq's Prosignia Eases Way Into Retail

November 16, 1998

Word Count: 512

Company Names: COMPAQ COMPUTER CORP

Industry Names: Computer; Personal computers; Portable computers

Product Names: Servers (357105); Personal computers, except portable (357161); Portable computers (357165)

Concept Terms: Ad budget; All company; All product and service information; Product introduction

Marketing Terms: All media; Ad volume

Brand Names: Prosignia

Geographic Names: North America (NOAX); United States (USA)

6/8/8 (Item 1 from file: 16)

Gale Group PROMT(R)

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05955919 Supplier Number: 53223404 (USE FORMAT 7 FOR FULLTEXT)

Compaq's Prosignia eases way into retail.(Product Information)

Nov 16 , 1998

Word Count: 534

Publisher Name: CMP Publications, Inc.

Company Names: *Compaq Computer Corp.

Event Names: *240 (Marketing procedures)

Geographic Names: *1USA (United States)

Product Names: *3573120 (Microcomputers); 5734000 (Computer Stores)

Industry Names: BUSN (Any type of business); CMPT (Computers and Office Automation); RETL (Retailing)

NAICS Codes: 334111 (Electronic Computer Manufacturing); 44312 (Computer and Software Stores)

Ticker Symbols: CPQ

Trade Names: Compaq ProSignia (Intel-compatible system)

Special Features: LOB; COMPANY

6/8/9 (Item 2 from file: 16)

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04686885 Supplier Number: 46898796 (USE FORMAT 7 FOR FULLTEXT)

Part One: November 1995 - February 1996. Part 2

Nov 18 , 1996

Word Count: 2507

Publisher Name: CMP Publications, Inc.

Company Names: *Acer America Corp.; Microsoft Corp.; Tech Data Corp.; Toshiba America Information Systems Inc.

Event Names: *600 (Market information - general); 220 (Strategy & planning)

Geographic Names: *1USA (United States)

Product Names: *7372400 (Applications Software); 3573120 (Microcomputers); 7372500 (Operating Systems & Utilities); 5081357 (Computers Wholesale)

Industry Names: BUSN (Any type of business); CMPT (Computers and Office Automation)

NAICS Codes: 51121 (Software Publishers); 334111 (Electronic Computer Manufacturing); 42143 (Computer and Computer Peripheral Equipment and Software Wholesalers)

Ticker Symbols: MSFT; TECD

Special Features: COMPANY

6/8/10 (Item 1 from file: 148)

Gale Group Trade & Industry DB

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11586627 Supplier Number: 55503797 (USE FORMAT 7 OR 9 FOR FULL TEXT)

The great European multimedia gamble.

Summer , 1995

Word Count: 6320 Line Count: 00528

Industry Codes/Names: BUS Business, General; BUSN Any type of business

Descriptors: Cable television broadcasting industry--Europe; Telecommunications industry --Europe; Europe--Business and industry

Product/Industry Names: 4800000 (Telecommunication Services)

Product/Industry Names: 4800 COMMUNICATION

NAICS Codes: 513 Broadcasting and Telecommunications

File Segment: TI File 148

6/8/11 (Item 2 from file: 148)

Gale Group Trade & Industry DB

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09120028 Supplier Number: 18884362 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Year in Review. (Nov to Feb 1996)(Special Fall Comdex Issue) (Industry Trend or Event)

Nov 18 , 1996

Word Count: 17658 Line Count: 01402

Special Features: illustration; photograph

Industry Codes/Names: CMPT Computers and Office Automation; BUSN Any type of business

Descriptors: Computers--History; Computer industry--History

Product/Industry Names: 3573000 (Computers & Auxiliary Equip)

Product/Industry Names: 3571 Electronic computers

File Segment: CD File 275

6/8/12 (Item 3 from file: 148)

Gale Group Trade & Industry DB

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08303152 Supplier Number: 17774074 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Year in review 1995. (computer industry) (part two, May 1995 - October 1995) (Industry Trend or Event)

Nov 20 , 1995

Word Count: 14582 Line Count: 01157

Special Features: illustration; photograph; table

Company Names: International Business Machines Corp.--Marketing; Intel Corp.--Marketing; Microsoft Corp.--Marketing

Industry Codes/Names: CMPT Computers and Office Automation

Descriptors: Computer industry--1995

Product/Industry Names: 3573000 (Computers & Auxiliary Equip)

Product/Industry Names: 3571 Electronic computers

Ticker Symbols: IBM; INTC; MSFT; IBM; INTC; MSFT

File Segment: CD File 275

6/8/13 (Item 4 from file: 148)

Gale Group Trade & Industry DB

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08266575 Supplier Number: 17556298 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Channel awakens to Win 95, services. (34 company profiles) (Part 2)(CRN Quarterly Industry Snapshot: Third Quarter 1995) (Company Financial Information)

Nov 6 , 1995

Word Count: 8265 Line Count: 00685

Special Features: illustration; graph

Company Names: International Business Machines Corp.--Finance; InaCom Corp.--Finance; Informix Software Inc.--Finance; Ingram Micro Inc.--Finance; Intel Corp.-- Finance; Intelligent Electronics Inc.--Finance; Macromedia Inc. (San Francisco, California)--Finance; Merisel Inc.--Finance; MicroAge Inc.-- Finance; Micrografx Inc.-- Finance; Micropolis Corp.--Finance; Microsoft Corp.--Finance; Motorola Inc.--Finance; NEC Technologies Inc.-- Finance; Netscape Communications Corp.--Finance; Novell Inc.--Finance; Oracle Corp. --Finance; Packard Bell Electronics Inc.--Finance; PictureTel Corp.-- Finance; Santa Cruz Operation Inc.--Finance; Seagate Technology Inc.- - Finance; Silicon Graphics Inc.--Finance; Software Spectrum Inc.--Finance; Stream International Inc.--Finance; Sun Microsystems Inc.--Finance; Sybase Inc.--Finance; Symantec Corp.--Finance; 3Com Corp.--Finance; Tech Data Corp.--Finance; Toshiba America Information Systems Inc.--Finance; U.S. Robotics Inc.--Finance; Vanstar Corp.-- Finance

Industry Codes/Names: CMPT Computers and Office Automation

Descriptors: Computer industry--Finance; Value-added resellers--Finance; Distributors (Commerce)--Finance

Product/Industry Names: 3573115 (Microcomputers); 7372000 (Computer Software); 7370000 (Computer Services)

Product/Industry Names: 3571 Electronic computers; 7372 Prepackaged software; 7370 Computer and Data Processing Services

Ticker Symbols: IBM; INAC; INTC; INEL; MACR; MSEL; MICA; MGXI; MLIS; MSFT; MOT; NSCP; NOVL; ORCL; PCTL; SCOC; SEGT; SGI; SSPE; SUNW; SYBS; SYMC; COMS; TECD; USRX

File Segment: CD File 275

6/8/14 (Item 5 from file: 148)

Gale Group Trade & Industry DB

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07618285 Supplier Number: 16374731 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Alphabetical listings. (telemarketing equipment manufacturers, value-added resellers, telemarketing service providers) (Buyers Guide)

Dec , 1994

Word Count: 32480 Line Count: 02687

Industry Codes/Names: ADV Advertising, Marketing and Public Relations

Descriptors: Telemarketing--Equipment and supplies; Telemarketing industry--Directories

Product/Industry Names: 7319700 (Telemarketing Services)

Product/Industry Names: 7389 Business services, not elsewhere classified

File Segment: TI File 148

? t s6/k/4

6/K/4 (Item 4 from file: 15)

ABI/Inform(R)

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The coming electronic commerce (r)evolution

Abstract:

...too early to declare salespeople an extinct species, technology will fundamentally change the role of manufacturers' sales reps, distributors, and dealers. In the process, a complex mix of winners and losers will emerge. The ownership and management of electronic commerce networks will clearly influence the acceptance of electronic commerce. The network managers and owners will likely come from: 1. associations, 2. resellers, 3. manufacturers, 4. technology companies, and 5. partnerships. Electronic commerce will create a massive restructuring of the current distribution system. The key elements of this...

Text:

...the need for a new part to improve his product design. Rather than calling a distributor, the engineer connects to an on-line service that provides substantial information: a roster of

vendors that can meet his technical specifications; a product list ranked by price; schematic diagrams; and...

...large, public warehouse and places an order for a sample. A bank affiliated with the on-line network extends credit if needed and electronically invoices the engineer's department. In turn, an...

...bill electronically. An express delivery firm delivers the part the next day.

A new customer/vendor relationship is established, but what (or where or who) was the channel of distribution? Over...

...too early to declare salespeople an extinct species, technology will fundamentally change the role of manufacturers' sales reps, distributors, and dealers. In the process, a complex mix of winners and losers will emerge. Strategists...

...meshing computer technology with the everyday business of buying and selling is being touted as "electronic commerce" (EC). Visions of consumer-oriented electronic commerce (TV shopping networks, CD-ROM product catalogs, etc.) have already attracted considerable media attention. However...

...to-business market has greater resources and incentives to become the first user of true, electronic commerce systems.

A viable electronic commerce system consists of five elements:

- * An extremely secure network linking buyers and sellers.
- * A database of product/vendor listings, prices, availability, product specifications, and related technical information.
- * Software that provides a consistent, easy...
- ...an expert systems capability to help uncover buyers' needs.
- * E-mail capability enabling buyers and sellers to seek information not immediately available on-line.
- * A mechanism for shipping, financing, and processing orders.

Electronic Commerce Today

Although the effect will be revolutionary, the emergence of electronic commerce will be evolutionary. Many advances still need to be made in interface software, communications bandwidth...

...have to change purchasing procedures, marketing techniques, and product

design processes.

However, many forerunners of electronic commerce already exist. A few companies list products and accept orders via on-line services such as Prodigy, CompuServe, or America Online. Since these networks lack security, multimedia, and payment features, they pose little challenge to traditional...

...corporate customers have CD-ROM drives, and more important, the CD-ROM catalogs lack any on-line connections to vendors.

The most ambitious venture so far is CommerceNet.(3) Funded by several Silicon Valley companies and the federal government, CommerceNet operates over the Internet, the forerunner of the information superhighway. On CommerceNet, buyers can seek out detailed product information from individual companies, or they can become members of the Internet Shopping Network, an on-line distributor of computer products. CommerceNet is still working on the directories and software needed to sort through its growing electronic commerce data base. Another entry is Pittsburgh-based IndustryNet. IndustryNet provides an information and shopping forum on the Internet for buyers and sellers of a wide variety of industrial products.

Times Mirror Cable Television and Digital Equipment Corporation are backing a more focused trial dubbed the Electronic Commerce Network.(4) The network ties together several Phoenix-based aerospace/defense contractors, their suppliers, and university engineering departments that provide research and consulting services. Using an Ethernet connection running...

...system, the participants can use videoconferencing to discuss initial product designs and later make an on-line payment for the finished goods.

While most of the commercial world is unaware of these developments, EC networks are about to change the fundamental structure of distribution. The Electronic Commerce Revolution

To truly understand the impact of electronic commerce on distribution, three key issues need to be considered:

- * Who will run the electronic commerce networks?
- * How will electronic commerce change the structure of distribution?
- * Who will the winners and losers be?

Who Will Run the Electronic Commerce Networks?

The ownership and management of electronic commerce networks will clearly influence the acceptance of electronic commerce.

The on-line airline reservation systems, some of the first examples of electronic commerce, provide interesting insights into the ownership issue. Leading airlines developed their own proprietary systems. With...

...running the system.

The reservation systems example leads to several key conclusions about ownership of electronic commerce networks:

- * The network owner must be independent, perceived as independent, or possess extremely high channel...

...e.g., later users will enjoy a more robust system than the early users), an electronic commerce network must find a way to "bootstrap" its system.(5) Vendors will not sign on without the promise of many buyers, but buyers will not sign...

...brands do not participate in the network.

- * Unique industry processes, programs, and products will drive electronic commerce networks to form around single industries.

Given these ownership factors and the current state of electronic commerce technology, the network managers and owners will likely come from:

Associations, Industry associations understand the...

...selling practices and lend the perception of independence. Associations would see the management of an electronic commerce network as justifying their ongoing role (and membership fees) in the industry. Strong associations, such...

...and ship the orders generated by their EC network. In the business-to-business markets, distributors, wholesalers, and franchisers already maintain extensive databases of product names, numbers,

and prices. However, they would still have to work with manufacturers to develop the electronic equivalent of spec sheets, product literature, and other technical information.

Manufacturers. Manufacturers are likely candidates to set up and manage EC networks. More so than resellers, manufacturers that sell through direct sales forces are struggling with rising selling costs. EC networks can provide an extremely efficient sales mechanism. In addition, manufacturers may view EC networks as a means of reducing the relative power that their reseller channels exert. Manufacturers also want more direct feedback from their customers and dealers, feedback that an EC network could provide but that a reseller might not or could not

provide.

However, manufacturers usually carry only their own brand(s). Therefore, manufacturers operating their own networks will really need a strong relationship to convince their resellers or...
...EC network is a complex mix of telecommunications and computer hardware, software, networks, and services. Suppliers of these products are fascinated by EC networks, not only as a means of reaching...

...emerging market for their products. Companies like Hewlett-Packard and Digital Equipment Corporation are exploring electronic commerce options through CommerceNet, through the Internet's World Wide Web, and various pilot programs.

Systems integrators, such as EDS or Computer...

...help value-added resellers (VARs) reduce the complexity of procuring parts from the 15-20 vendors that make up a typical computer system. Even publishing companies like Ziff-Davis have announced EC ventures.

Microsoft deserves special attention. Microsoft's new on-line service offers many EC features and Windows 95 provides direct access to the Internet. Despite its failed attempt to buy financial software leader Intuit, Microsoft is recruiting vendors that want to sell through its on-line service. As a product category, software is a natural first market for EC distribution since...

...companies can offer that mix. Exhibit 1 shows a likely scenario for the emergence of electronic commerce. At first, CD-ROM catalogs and bulletin board shopping services give businesses a taste of...

...and user bases. However, the first viable EC efforts will be proprietary systems linking a manufacturer with its distributors or a distributor with its retailers. Within a short period of time, these proprietary systems will include commercial end users.

Many people assume that the Internet will be the network of choice for electronic commerce. However, many senior managers interviewed by Frank Lynn & Associates do not want their buyers searching across the Internet, wasting time and buying unapproved brands or products. These executives also question the level of security available over the Internet. In response, several technology suppliers are offering to integrate electronic commerce modules into individual companies' internal computer networks. Buyers would access a company-specific electronic commerce system to collect information and make product selections. A centralized purchasing manager would review these choices and funnel them into traditional channels or an external

electronic commerce
system.

Regardless of the media, end users will begin to recognize the benefits of electronic commerce, particularly its ability to search across multiple vendors' offerings. However, end users will not want to learn separate systems or search each vendor individually. This will cause an "open system" approach to emerge across a specific industry or...

...the sense that the system manager is independent of the products sold and permits any manufacturer, reseller, or end user to use the system.

Like most network structures, pressure will build...

...what happened with automated teller machine networks, the early telephone networks, credit cards, and the Internet itself. Networks have an inherent tendency to coalesce. As noted earlier, some companies, such as...

...other big players. Ultimately, the EC systems will extend into the consumer market.

How Will Electronic Commerce Change the Structure of
Distribution?

Electronic commerce will create a massive restructuring of the current distribution system. The key elements of this...

...are the barriers to entry, the cost structure, lower prices and shifting roles, consolidation, and channel conflict.

Barriers to entry. Electronic commerce will eliminate many of the barriers to entry formerly represented by distribution channels. For market leaders, a ...share, or financial resources, and they do not like to spread themselves across too many suppliers. Channels also represent a barrier, particularly to smaller manufacturers that lack the volume and economies of scale to create end-user demand--a strong prerequisite for attracting resellers.

However, with electronic commerce, shelf space is virtually unlimited. Electronic commerce companies will want to put as many manufacturers as possible on their networks. In fact, the networks will probably compete on the basis of how many companies' products they offer.

Entrenched manufacturers will certainly retain some advantage, possibly by providing more accurate or timely information, better graphics, or sophisticated analytical tools. However, electronic commerce overall will reduce the barriers that distribution channels traditionally offered the market leaders.

Cost structure. Electronic commerce will substantially reduce the cost of channel marketing. Today, a typical manufacturer offers a real discount of about 25% to its distributors to cover their expense and profit requirements. The manufacturer incurs an additional cost (7-15% of its net revenue) to manage its reseller network ...

...out of every three dollars spent by the end user is related to channel activities. Electronic commerce will sharply reduce these costs on both an absolute and a percentage basis. The cost...

...that selling expenses account for \$0.35 of the three dollars spent on channel activities. Electronic commerce will not wipe out all sales activities--as one New Yorker cartoon put it "no...

...for their computer mouse rather than a sales rep's phone number.

2. More competition. Electronic commerce will give customers access to more suppliers. This increased supply will inevitably create more price competition. One electronic commerce project underway is run by the Lawrence Livermore National Laboratory to help reduce costs at...

...Force could not only efficiently request bids at any level, but a wider variety of suppliers could find out about the bids. In the first few months of the program, the...

...lower purchasing costs and substantial price savings.(6) By eliminating significant buying and selling costs, electronic commerce will cause a significant drop in prices.

3. Improved communication. Long lines of communication between end users, channels, and manufacturers result in many inefficiencies. Manufacturers design, build and ship products that customers do not want. Resellers hold safety stock to...

...searches easier, the cost of channel marketing will be greatly reduced.

Lower prices, shifting roles. Electronic commerce will increase competition and lower marketing and sales expenses. Prices will also head downward because electronic commerce provides more information. End users have limited time for shopping. Typically, they reduce their search costs by quickly narrowing choices to a "short list," using the purchasing department's "approved vendors list" or simply sticking with their existing brands.

Electronic commerce will provide quick, easy, and broad access to product and pricing information. The software will...
...pricing and product criteria. Armed with this broader set of information, buyers will insist on manufacturers meeting the best price/performance mix that shows up on the computer screen.

Interestingly, the promise of lower prices involves a restructuring of traditional buyer/seller roles. Electronic commerce will transfer more of the information function from the manufacturer or reseller to the end user. Normann and Ramirez point out how marketing innovators, such...

...division of labor...if customers agree to take on certain key tasks traditionally done by manufacturers and retailers--the assembly of products and their delivery to customers' homes--then IKEA promises to deliver well-designed products at substantially lower prices."

Electronic commerce offers the same, new division of labor.(7) If customers will search electronically for information instead of asking a salesperson, manufacturers can offer lower prices and probably better service.

Consolidation. Ultimately, electronic commerce poses a substantial threat to many resellers. Large resellers base their strategies on low, volume...

...stop shopping. Small resellers exist and thrive because they provide more personal and focused support.

Electronic commerce allows customers to shop and access information directly. With almost no support requirement other than logistics, large distributors will seek even greater economies of scale by moving into entirely new industries, acting as public warehouses. Michael Pickett, chief executive of Merisel, the large computer distributor, sees an era of "virtual distributors" transporting everything from PCs to polyethylene.(8) The resultant economies of scale and the infrastructure requirements will likely cause mergers and bankruptcies among today's large resellers.

Electronic commerce will not replace all of the relationship and support elements now offered by small resellers...

...even to take title to products.

Channel conflict. Consolidation will not happen overnight. Therefore, as manufacturers begin to use EC systems to reach end users directly, traditional resellers will complain loudly...

...From a legal perspective, the dealers claimed that Microsoft was tying the purchase of its online system to the purchase of the operating

system. Actually, the resellers feared that Microsoft was ...whenever one channel is eclipsed by another channel (e.g., superstores replacing small dealers, or distributors selling into accounts previously managed by direct sales forces). Electronic commerce is no exception. In fact, the emergence of dramatic conflict (especially prior to actual sales ...

...EC networks will bring to traditional distribution. The conflict may slightly delay the growth of electronic commerce, but companies have developed a large repertoire of techniques for managing conflict among their channels...

...Traditional channel marketing systems will undergo a massive transformation in the next few years as on-line communication radically alters the way buyers and sellers exchange information. The transformation will give end users powerful new tools to seek out the ...

...not only to the end user but to the EC network managers, and to those manufacturers that quickly understand the workings of the new EC channel.

The basis of competition will...

...also come from those companies that design products and that score well when filtered by on-line search engines.

Companies that want to participate in electronic commerce will need to recognize that the consumer market will take a back seat to the business-to-business market. To tap into the commercial electronic commerce channel, companies should move incrementally and broadly. Moving incrementally will hide potential conflicts while the company gains experience with electronic commerce technology. By experimenting broadly with CD-ROMs, the Internet, and private electronic commerce systems, companies can determine which approach best fits their strategic, customer, and technical requirements. As electronic commerce networks expand, companies must prepare to abandon proprietary networks and embrace emerging industry-wide networks.

Innovators see electronic commerce as a strategic opportunity: reducing transaction costs, eliminating barriers to entry, and shifting the basis of competition. However, entrenched manufacturers will find it difficult to transition from their established channels. To minimize conflict, vendors may downplay their efforts until industry-wide networks provide a cover. Traditional channels often accept change if they cannot focus their complaints against a single vendor

The move to electronic commerce will replace the traditional inventory-based model with an information-based model. If manufacturers, wholesalers, dealers, and end users do not start envisioning their role in such a world...

...in the Economy," Scientific American: 92-99. 1990.

6. Doug Van Kirk, "Government Lab Advances Electronic Commerce," Infoworld: 60. January 17, 1994.

7. Richard Normann and Rafael Ramirez, "From Value Chain to...

...Pickett Outlines 'Virtual Distribution' Concept," Computer Reseller News: 6. March 7, 1994.

9. Don Clark, "Retailers Fear Microsoft Network Will Leave Them Out of the Loop," Wall Street Journal: B6. February...

...leads the firm's high technology practice and actively monitors developments in the field of electronic commerce.

Descriptors:
...Internet

Classification Codes:

? t s6/k/1

6/K/1 (Item 1 from file: 15)

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Text:

...chain. Instead of printing books in large numbers and distributing them through a network of distributors to retailers, it is possible for the publisher to print on demand in the bookstore or the online-retailer's shipping center.

The impact of the supply chain redesign is to increase the product range that can be offered by an individual retailer, but also to reduce the delivery lead-time and price especially for specialty and professional titles. However, printing on demand in the bookstore or in the online-retailer's shipping center is simply doing what the conventional supply chain does, only faster and...

...product, but also the right value offering for the customer. In a conventional chain, the supplier focuses on winning the customer's purchase that is, he competes on price, delivery and...

...lowers the costs of goods sold.

This is all very well, but how does a supplier get started? How can your company do it - is it magic?
Find the Right Demand...

...that each supply chain member performs a distinct value adding task, and

instead regard both suppliers and customer as potential co-producers of value.

Ikea managed to make the consumer a...

...refer to as the demand chain [5]. The demand chain transfers demand from markets to suppliers. For example: prospecting, specifying the product and making the purchase is a simple demand chain for a consumer. For a retailer, the demand chain would consist of merchandising, inventory management and purchasing.

The demand chain is...

...the point in the demand chain at which the customer allocates demand to a specific supplier. The value offering point is a new concept that is proving itself useful for supplier companies to identify ways of becoming their customer's co-producer. It builds on the idea that to escape the commodity supplier trap you need to understand individual customer's demand process [6] [7]. The difference, however...

...the one side and transaction costs on the other. The objective is to change the supplier-customer relationship in such a way that value is increased and waste reduced, that is, reduce transaction costs by reorganizing [8]. For example, a supplier that takes responsibility for managing the retail customer's inventory becomes a co-retailer, that is a co-producer of retail value, sharing the objective of minimizing lost sales...

...now a trade off between improved retailing efficiency and the cost of integrating with the supplier and possibly paying a higher price for the product.

The second link is at the...

...is allocated to a specific customer. Moving the order penetration changes the economics of the supplier, that is, the cost to serve a customer. The order penetration point is a well...

...the value offering point changes the customer's economics. Three value offering points for a supplier to the demand chain of a distributor or retail chain is considered.

In an arms-length, conventional buyer seller relationship, the value offering point of the supplier is to the distributor's or retailer's purchasing function. The buyer in the customer's purchasing organization makes the decision of...

...between the cost of the purchasing function and the success of that function [11].

A vendor managed inventory (VMI) solution moves the decision to do business from purchasing, to when a product is taken into the

distributor's or retailer's inventory. With an offer to inventory management, the supplier can make a difference in reducing obsolescence and increasing his customer's sales [12]. However, the benefit for the customer is offset by the cost of integrating with each VMI supplier, which makes it unlikely that, a distributor or retail chain will want to integrate with smaller suppliers.

Figure 2

Efficient consumer response (ECR) moves the customer decision to buy to assortment planning. A supplier's offer to assortment planning or merchandising makes it possible to simplify the planning and...

...in the retail store much more effective in meeting consumer requirements [13]. For example, a supplier does not introduce new product variants simply to conquer shelf space from competitors or try...

...trade-off. The value of improved responsiveness is offset by the cost of collaborating with suppliers. The cost of collaboration increases with the number of suppliers involved and the level of detail. For example, the cost of collaboration is much higher...

...stock keeping unit level, rather than on a shop format and category level.

For the supplier, the cost to serve a customer segment or market is driven by product differentiation, supply...

...service level commitments and demand uncertainty [14]. Moving the order penetration point changes how the supplier makes the service and cost trade-off decision [15].

When products are shipped from a...

...to the customer's order, it is product range that determines the economics of the supplier (see Figure 3). The total inventory required for serving the market increases with each product...

...points to packaging or assembly eliminates the need to keep finished goods inventory. Instead, the supplier must balance service level and leadtime objectives against the cost to keep capacity reserves to...
...to produce unique products according to customer specifications. However, process efficiency declines each time the supplier abandons a standard design and process for a customized one.

Change the Game

Moving the...

...and will often reveal ways of both serving customers better and remove constraints in the supplier operation. Moving the value offering point in the customer's demand chain takes you from...

...development [16]. The procedure to change the value added and the business rules in a supplier-customer relationship is to move both the order penetration and value offering point in looking...against capacity utilization.

The benefit for the customer from the integration is that now the supplier can focus on what matters for the customer. For example, reducing lost sales and obsolescence...

...prices have gone down.

Leverage the Value Offering Point

With an offer-to-purchase, a supplier competes on price, delivery time and product variety. An online retailer such as amazon.com is a good example of a demand-- supply chain shaper with...

...value offering needs to hit on accuracy breakpoints to work. Avnet [20], an electronics component distributor, improves the accuracy of their customer's planning by delivering component kits according to the...

...individual components.

Shaping opportunities with an offer-to-end user are as yet mostly unexploited by manufacturers, but with the emergence of ecommerce we

will see more examples. Dell and Cisco are...

...solutions for business customer's [3] [21]. Nokia Wellmate, again, is an example where a manufacturer has found a way to make its product a critical part of a private customer making the offer to purchase over the Internet, the company can provide customers who have special preferences with tailored selections - for example not...

...do? The answer is to prepare for serving many VOPs.

For example, an original equipment manufacturer needs to develop the order administration and capability to give reliable availability promises for the...

...company can move to an offer-to-inventory with its own sales companies and large distributors. Instead of reacting to orders, the OEM now reacts to stock levels reported by the...

...for products with very short product life cycles. For example, instead of inventory management the supplier takes responsibility to launch and ramp-down products according to set category rules for each...

...formats.

Figure 6

The Value Reengineering Process

The starting point for value reengineering in a supplier company is the existing customer and product segmentation (see Figure 7). The first step is...

...solution is carved-out as a distinct end-to-end slice from the customer and supplier operations. The carve-out, or design and implementation are done in microcosm [23]. This is the extended enterprise of the particular target customer including the supplier. When the solution has been developed and tested, it can then be scaled up to...in two VOP segments. The whole program took a year and a half. For the supplier the impact was reducing pipeline inventory by 50 to 75 percent depending on the product...

...VOP segmentation of all customers.

Why is the carve-out important? It is because the supplier cannot change the value offering point for all customers at the same time. Unless you...

...costs exceeds the value added of a new value offering point. In such cases, the supplier needs to wait until he has cut the required integration and collaboration effort to a level that the customer is prepared to make.

Carving out new demand-supply chain configurations within the current business has several advantages. First, it reduces business risk and channel conflicts for the supplier. This is because results achieved with customers ready to make the integration and collaboration effort, also, help the supplier improve the service to customers operating in the old way. For example, when moving to an offer to inventory management with large customers, the supplier can alleviate the concern of smaller customers by pointing out that with a more stable...

...a part of the sales and customer management process. For example, Avnet the electronics component distributor has made tailoring the demand-- supply chain for the customer's part of its sales...

...redesign effort, the customer's business is affected through the processes it shares with the supplier. This means that there, even after an extensive reengineering effort, often remains a substantial requirements...

...value reengineering approach the starting point is the value offering to the customer, and the supplier changes its operation to deliver a complete new value offering. In the end-to-end...

...s issues are addressed and solved in practice. Here, the business process efficiency of the

supplier is not the objective, but a constraint that is actively addressed in cooperation with the...

...consumer goods company was able to identify a simple and easily scalable IT solution for vendor managed inventory by first designing the process using manual and simple spreadsheet based procedures [24...

...other customers in the same VOP segment. Value reengineering is a systematic approach to capture e-commerce opportunities. The challenge that e-commerce technology presents companies is to attack or be attacked, to operate differently, and to cut the lead-time from strategy to implementation. With value reengineering a supplier company can proactively start building its future business models by identifying and piloting new value ...9, No.1 (1998), pp. 1-13.

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6/7/4 (Item 4 from file: 15)

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The coming electronic commerce (r)evolution

Abstract:

Over the next few years, advances in computer networking and software will radically transform the structure of distribution channels. While it is

too early to declare salespeople an extinct species, technology will fundamentally change the role of manufacturers' sales reps, distributors, and dealers. In the process, a complex mix of winners and losers will emerge. The ownership and management of electronic commerce networks will clearly influence the acceptance of electronic commerce. The network managers and owners will likely come from: 1. associations, 2. resellers, 3. manufacturers, 4. technology companies, and 5. partnerships. Electronic commerce will create a massive restructuring of the current distribution system. The key elements of this restructuring are: 1. barriers to entry, 2. cost structure, 3. lower prices and shifting roles, 4. consolidation, and 5. channel conflict.

Text:

Staring at the mechanical drawing on his computer screen, an engineer recognizes the need for a new part to improve his product design. Rather than calling a distributor, the engineer connects to an on-line service that provides substantial information: a roster of vendors that can meet his technical specifications; a product list ranked by price; schematic diagrams; and test results, product reviews, and comments from other engineers.

Satisfied with his information search, the engineer checks for the product's availability at a large, public warehouse and places an order for a sample. A bank affiliated with the on-line network extends credit if needed and electronically invoices the engineer's department. In turn, an EDI system pays the bill electronically. An express delivery firm delivers the part the next day.

A new customer/vendor relationship is established, but what (or where or who) was the channel of distribution? Over the next few years, advances in computer networking and software will radically transform the structure of distribution channels. While it is too early to declare salespeople an extinct species, technology will fundamentally change the role of manufacturers' sales reps, distributors, and dealers. In the process, a complex mix of winners and losers will emerge.

Strategists often ignore the role that distribution channels play in determining corporate success.(1) However, as Peter Drucker points out, "From being organized around the flow of things and the flow of money, [the economy] is becoming organized around the flow of information."(2) As information transforms distribution, it will also transform entire industries.

The overarching vision meshing computer technology with the everyday business of buying and selling is being touted as "electronic commerce" (EC). Visions of consumer-oriented electronic commerce (TV shopping networks, CD-ROM product catalogs, etc.) have

already attracted considerable media attention. However, the business-to-business market has greater resources and incentives to become the first user of true, electronic commerce systems.

A viable electronic commerce system consists of five elements:

- * An extremely secure network linking buyers and sellers.
- * A database of product/vendor listings, prices, availability, product specifications, and related technical information.
- * Software that provides a consistent, easy-to-use interface; a means of accessing and sorting the database and eventually an expert systems capability to help uncover buyers' needs.
- * E-mail capability enabling buyers and sellers to seek information not immediately available on-line.
- * A mechanism for shipping, financing, and processing orders.

Electronic Commerce Today

Although the effect will be revolutionary, the emergence of electronic commerce will be evolutionary. Many advances still need to be made in interface software, communications bandwidth, and security standards. Businesses will have to change purchasing procedures, marketing techniques, and product design processes.

However, many forerunners of electronic commerce already exist. A few companies list products and accept orders via on-line services such as Prodigy, CompuServe, or America Online. Since these networks lack security, multimedia, and payment features, they pose little challenge to traditional commercial distribution.

Over 200 companies offer CD-ROM-based product catalogs. However, few corporate customers have CD-ROM drives, and more important, the CD-ROM catalogs lack any on-line connections to vendors.

The most ambitious venture so far is CommerceNet.⁽³⁾ Funded by several Silicon Valley companies and the federal government, CommerceNet operates over the Internet, the forerunner of the information superhighway. On CommerceNet, buyers can seek out detailed product information from individual companies, or they can become members of the Internet Shopping Network, an on-line distributor of computer products. CommerceNet is still working on the directories and software needed to sort through its growing

electronic commerce data base. Another entry is Pittsburgh-based IndustryNet. IndustryNet provides an information and shopping forum on the Internet for buyers and sellers of a wide variety of industrial products.

Times Mirror Cable Television and Digital Equipment Corporation are backing a more focused trial dubbed the Electronic Commerce Network.(4) The network ties together several Phoenix-based aerospace/defense contractors, their suppliers, and university engineering departments that provide research and consulting services. Using an Ethernet connection running on the local cable system, the participants can use videoconferencing to discuss initial product designs and later make an on-line payment for the finished goods. While most of the commercial world is unaware of these developments, EC networks are about to change the fundamental structure of distribution.

The Electronic Commerce Revolution

To truly understand the impact of electronic commerce on distribution, three key issues need to be considered:

- * Who will run the electronic commerce networks?
- * How will electronic commerce change the structure of distribution?
- * Who will the winners and losers be?

Who Will Run the Electronic Commerce Networks?

The ownership and management of electronic commerce networks will clearly influence the acceptance of electronic commerce. The on-line airline reservation systems, some of the first examples of electronic commerce, provide interesting insights into the ownership issue. Leading airlines developed their own proprietary systems. With these reservation systems, carriers attempted to increase travel agent allegiance to the airline, build customer brand loyalty and, eventually, lower costs. Travel agents welcomed the productivity and customer service improvements. However, the agents feared the network might eventually give the airlines more power over them, particularly in negotiating commission levels. Also, the federal government felt that the systems were biased in favor of the airline running the system.

The reservation systems example leads to several key conclusions about ownership of electronic commerce networks:

- * The network owner must be independent, perceived as independent, or possess extremely high channel power.
- * With increasing returns to scale (e.g., later users will enjoy a more robust system than the early users), an electronic commerce network must find a way to "bootstrap" its system.(5) Vendors will not sign on without the promise of many buyers, but buyers will not sign on if major brands do not participate in the network.
- * Unique industry processes, programs, and products will drive electronic commerce networks to form around single

industries.

Given these ownership factors and the current state of electronic commerce technology, the network managers and owners will likely come from:

Associations. Industry associations understand the industry buying and selling practices and lend the perception of independence. Associations would see the management of an electronic commerce network as justifying their ongoing role (and membership fees) in the industry. Strong associations, such as the National Office Products Association or the National Association of Home Builders could lead the development of EC networks in their industries. The Photo Marketing Association already has a rudimentary EC network running on CompuServe.

Resellers. Resellers are in a better position to own and manage an entire network. Instead of just encouraging participation or maintaining the network, resellers could actually process, pick, pack, and ship the orders generated by their EC network. In the business-to-business markets, distributors, wholesalers, and franchisers already maintain extensive databases of product names, numbers, and prices. However, they would still have to work with manufacturers to develop the electronic equivalent of spec sheets, product literature, and other technical information.

Manufacturers. Manufacturers are likely candidates to set up and manage EC networks. More so than resellers, manufacturers that sell through direct sales forces are struggling with rising selling costs. EC networks can provide an extremely efficient sales mechanism. In addition, manufacturers may view EC networks as a means of reducing the relative power that their reseller channels exert. Manufacturers also want more direct feedback from their customers and dealers, feedback that an EC network could provide but that a reseller might not or could not provide.

However, manufacturers usually carry only their own brand(s). Therefore, manufacturers operating their own networks will really need a strong relationship to convince their resellers or end-users to jump on board.

Technology Companies. An EC network is a complex mix of telecommunications and computer hardware, software, networks, and services.

Suppliers

of these products are fascinated by EC networks, not only as a means of reaching their customers but as a huge emerging market for their products. Companies like Hewlett-Packard and Digital Equipment Corporation are exploring electronic commerce options through CommerceNet, through the Internet's World Wide Web, and various pilot programs.

Systems integrators, such as EDS or Computer Science Corporation, might design and manage EC networks. Software companies like Microsoft, EDI specialist Sterling Software, or CBMS might position software as the linchpin in any EC network. CBMS is offering a unique system to help value-added resellers (VARs) reduce the complexity of procuring parts from the 15-20 vendors that make up a typical computer system. Even publishing companies like Ziff-Davis have announced EC ventures.

Microsoft deserves special attention. Microsoft's new on-line service offers many EC features and Windows 95 provides direct access to the Internet. Despite its failed attempt to buy financial software leader Intuit, Microsoft is recruiting vendors that want to sell through its on-line service. As a product category, software is a natural first market for EC distribution since the actual product can be delivered electronically. Given Microsoft's market position and visibility, its Windows 95 launch could jump-start the EC revolution.

Partnerships. The most likely organizational structure is a partnership. EC networks will require a broad mix of technology, capital, order handling and processing, trade financing, and the perception of independence. Few single companies can offer that mix.

Exhibit 1 shows a likely scenario for the emergence of electronic commerce. At first, CD-ROM catalogs and bulletin board shopping services give businesses a taste of the future. Ambitious startups, such as CommerceNet, slowly expand their services and user bases. However, the first viable EC efforts will be proprietary systems linking a manufacturer with its distributors or a distributor with its retailers. Within a short period of time, these proprietary systems will include commercial end users.

Many people assume that the Internet will be the network of choice for electronic commerce. However, many senior managers interviewed by Frank Lynn & Associates do not want their buyers searching across the Internet, wasting time and buying unapproved brands or products. These executives also question the level of security available over the Internet. In response, several technology suppliers are offering to integrate electronic commerce modules into individual companies' internal computer networks. Buyers would access a company-specific electronic commerce system to collect information and make product selections. A centralized purchasing manager would review these choices and funnel them into traditional channels or an external electronic commerce system.

Regardless of the media, end users will begin to recognize the benefits of electronic commerce, particularly its ability to search across multiple vendors' offerings. However, end users will not want to learn separate systems or search each vendor individually. This will cause an "open system" approach to emerge across a specific industry or "community of interest," such as healthcare, commercial real estate, or office supplies. This system will be "open" in the sense that the system

manager is independent of the products sold and permits any manufacturer, reseller, or end user to use the system.

Like most network structures, pressure will build to merge the growing number of industry-specific systems into larger, branded networks. This is exactly what happened with automated teller machine networks, the early telephone networks, credit cards, and the Internet itself. Networks have an inherent tendency to coalesce. As noted earlier, some companies, such as Microsoft, USWest, Time-Warner, AT&T, Bank of America, or MCI, may eventually create broad, brand-named EC systems. They will buy out smaller, regional or industry-specific systems and slug it out with the other big players. Ultimately, the EC systems will extend into the consumer market.

How Will Electronic Commerce Change the Structure of Distribution?

Electronic commerce will create a massive restructuring of the current distribution system. The key elements of this restructuring are the barriers to entry, the cost structure, lower prices and shifting roles, consolidation, and channel conflict.

Barriers to entry. Electronic commerce will eliminate many of the barriers to entry formerly represented by distribution channels. For market leaders, a strong position in the distribution channel provides a defense against competitors. Channels have limited shelf space, mind share, or financial resources, and they do not like to spread themselves across too many suppliers. Channels also represent a barrier, particularly to smaller manufacturers that lack the volume and economies of scale to create end-user demand--a strong prerequisite for attracting resellers.

However, with electronic commerce

, shelf space is virtually unlimited. Electronic commerce companies will want to put as many manufacturers as possible on their networks. In fact, the networks will probably compete on the basis of how many companies' products they offer.

Entrenched manufacturers will certainly retain some advantage, possibly by providing more accurate or timely information, better graphics, or sophisticated analytical tools. However, electronic commerce overall will reduce the barriers that distribution channels traditionally offered the market leaders.

Cost structure. Electronic commerce will substantially reduce the cost of channel marketing. Today, a typical manufacturer offers a real discount of about 25% to its distributors to cover their expense and profit requirements. The manufacturer incurs an additional cost (7-15% of its net revenue) to manage its reseller network. Overall, this means that about one out of every three dollars spent by the

end user is related to channel activities. Electronic commerce will sharply reduce these costs on both an absolute and a percentage basis. The cost savings will come from three sources:

1. Elimination of the sales function. Frank Lynn & Associates estimates that selling expenses account for \$0.35 of the three dollars spent on channel activities. Electronic commerce will not wipe out all sales activities--as one New Yorker cartoon put it "no information superhighway, no matter how vast, will eliminate the art of the schmooze." But EC networks will entice many customers to reach for their computer mouse rather than a sales rep's phone number.

2. More competition. Electronic commerce will give customers access to more suppliers. This increased supply will inevitably create more price competition. One electronic commerce project underway is run by the Lawrence Livermore National Laboratory to help reduce costs at Wright Patterson Air Force Base. The Air Force was not required to get bids for anything under \$2,500 due to high purchasing costs. Under the Livermore system, the Air Force could not only efficiently request bids at any level, but a wider variety of suppliers could find out about the bids. In the first few months of the program, the Air Force has achieved 10% lower purchasing costs and substantial price savings.(6) By eliminating significant buying and selling costs, electronic commerce will cause a significant drop in prices.

3. Improved communication. Long lines of communication between end users, channels, and manufacturers result in many inefficiencies. Manufacturers design, build and ship products that customers do not want. Resellers hold safety stock to guard against unpredictable end-user demand. Product returns tie up all parties involved. Endless hours are spent configuring systems, checking order status, resolving misunderstandings. By consolidating information, empowering end users to seek their own answers, and making data searches easier, the cost of channel marketing will be greatly reduced.

Lower prices, shifting roles. Electronic commerce will increase competition and lower marketing and sales expenses. Prices will also head downward because electronic commerce provides more information. End users have limited time for shopping. Typically, they reduce their search costs by quickly narrowing choices to a "short list," using the purchasing department's "approved vendors list" or simply sticking with their existing brands.

Electronic commerce will provide quick, easy, and broad access to product and pricing information. The software will allow buyers to rank the information by a variety of pricing and product criteria. Armed with this broader set of information, buyers will insist on manufacturers meeting the best price/performance mix that shows up on the computer screen.

Interestingly, the promise of lower prices involves a restructuring of traditional buyer/seller roles. Electronic commerce

will transfer more of the information function from the manufacturer or reseller to the end user. Normann and Ramirez point out how marketing innovators, such as IKEA, the Swedish furniture company, use this technique to reduce selling costs:

"It [IKEA] offers a brand new division of labor...if customers agree to take on certain key tasks traditionally done by manufacturers and retailers--the assembly of products and their delivery to customers' homes--then IKEA promises to deliver well-designed products at substantially lower prices."

Electronic commerce offers the same, new division of labor.(7) If customers will search electronically for information instead of asking a salesperson, manufacturers can offer lower prices and probably better service.

Consolidation. Ultimately, electronic commerce poses a substantial threat to many resellers. Large resellers base their strategies on low, volume-driven pricing and one-stop shopping. Small resellers exist and thrive because they provide more personal and focused support.

Electronic commerce allows customers to shop and access information directly. With almost no support requirement other than logistics, large distributors will seek even greater economies of scale by moving into entirely new industries, acting as public warehouses. Michael Pickett, chief executive of Merisel, the large computer distributor, sees an era of "virtual distributors" transporting everything from PCs to polyethylene.(8) The resultant economies of scale and the infrastructure requirements will likely cause mergers and bankruptcies among today's large resellers.

Electronic commerce will not replace all of the relationship and support elements now offered by small resellers. However, little reason exists for these resellers to hold much inventory or even to take title to products.

Channel conflict. Consolidation will not happen overnight. Therefore, as manufacturers begin to use EC systems to reach end users directly, traditional resellers will complain loudly about channel conflict.

Fearing the EC capabilities of Windows 95, one reseller group sued Microsoft even before the product became publicly available. From a legal perspective, the dealers claimed that Microsoft was tying the purchase of its online system to the purchase of the operating system. Actually, the resellers feared that Microsoft was forcing them to sell the means of their own destruction. Microsoft could use the EC features built into Windows 95 to sell subsequent software directly to end users, bypassing the dealers.(9)

Conflict of this type is inevitable whenever one channel is eclipsed by another channel (e.g., superstores replacing small dealers, or distributors selling into accounts previously managed by direct sales forces). Electronic commerce is no exception. In fact, the emergence of dramatic conflict (especially prior to actual sales and especially legal action) is proof of the substantial changes EC networks will bring to traditional distribution. The conflict may slightly delay the growth of electronic commerce, but companies have developed a large repertoire of techniques for managing conflict among their channels.(10)

A Strategic Opportunity

Traditional channel marketing systems will undergo a massive transformation in the next few years as on-line communication radically alters the way buyers and sellers exchange information. The transformation will give end users powerful new tools to seek out the best product at the best price with the best service. However, the role and the power of traditional channels will greatly diminish. Power will flow not only to the end user but to the EC network managers, and to those manufacturers that quickly understand the workings of the new EC channel.

The basis of competition will shift from companies with strong distribution channels to those with strong information systems. The winners will find means of graphically displaying data, updating data on a frequent basis, and responding to E-mail in a creative and real-time mode. The winners will also come from those companies that design products and that score well when filtered by on-line search engines.

Companies that want to participate in electronic commerce will need to recognize that the consumer market will take a back seat to the business-to-business market. To tap into the commercial electronic commerce channel, companies should move incrementally and broadly. Moving incrementally will hide potential conflicts while the company gains experience with electronic commerce technology. By experimenting broadly with CD-ROMs, the Internet, and private electronic commerce systems, companies can determine which approach best fits their strategic, customer, and technical requirements. As electronic commerce networks expand, companies must prepare to abandon proprietary networks and embrace emerging industry-wide networks.

Innovators see electronic commerce as a strategic opportunity: reducing transaction costs, eliminating barriers to entry, and shifting the basis of competition. However, entrenched manufacturers will find it difficult to transition from their established channels. To minimize conflict, vendors may downplay their efforts until industry-wide networks provide a cover. Traditional channels often accept change if they cannot focus their complaints against a single vendor

.

The move to electronic commerce will replace the traditional inventory-based model with an information-based model. If manufacturers, wholesalers, dealers, and end users do not start envisioning their role in such a world, they will quickly find themselves without options.

Notes

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9. Don Clark, "Retailers Fear Microsoft Network Will Leave Them Out of the Loop," Wall Street Journal: B6. February 13, 1995.
10. "Managing Channel Conflict," Frank Lynn & Associates, Inc. (1993). Robert Segal is a Principal with Frank Lynn & Associates, a Chicago-based consulting firm specializing in channel marketing. He leads the firm's high technology practice and actively monitors developments in the field of electronic commerce.

THIS IS THE FULL-TEXT.

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Segal, Robert L

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652068 MERCHANTS

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8208537 ONLINE

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11708577 INTERNET

126117552 ON

20084181 LINE

2579291 ON(W)LINE

89434 E-COMMERCE

18705278 E

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1743184 RETAILER

2635671 RETAILERS

851189 MERCHANT

652068 MERCHANTS

811847 SELLER

894895 SELLERS

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>>>W: Duplicate detection is not supported for File 348.

Duplicate detection is not supported for File 349.

Duplicate detection is not supported for File 347.

Records from unsupported files will be retained in the RD set.

S11 44 RD (UNIQUE ITEMS)

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>>>E: Set 44 does not exist

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>>>W: "FREE" is not a valid format name in file(s): 347-349

11/8/1 (Item 1 from file: 15)

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02041352 55658001

USE FORMAT 7 OR 9 FOR FULL TEXT

Using value reengineering to implement breakthrough solutions for customers

Word Count: 5298 Length: 12 Pages

1999

Descriptors: Supply chains; Operations research; Studies; Customer relations; Supply & demand

Classification Codes: 9130 (CN=Experimental/Theoretical); 2600 (CN=Management science/Operations research)

Print Media ID: 37879

11/8/2 (Item 2 from file: 15)

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01777449 04-28440

USE FORMAT 7 OR 9 FOR FULL TEXT

Cost-effective customer service

Word Count: 503 Length: 1 Pages

Feb 8, 1999

Company Names:

BMG Entertainment North America

Federal Express Corp (Duns: 05-807-0459 Ticker: FDX)

Atochem North America (Duns: 00-229-0773)
Geographic Names: US

Descriptors: Customer services; Technological planning; Internet
Classification Codes: 9190 (CN=United States); 2400 (CN=Public relations); 5220 (CN=Data processing management); 5250 (CN=Telecommunications systems)

11/8/3 (Item 3 from file: 15)
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01636388 02-87377
USE FORMAT 7 OR 9 FOR FULL TEXT

Vendors air concerns over EDI sites
Word Count:

568 Length: 1 Pages
May 11, 1998
Geographic Names: US

Descriptors: Distribution channels; Competition; Computer industry; Electronic commerce; Market strategy
Classification Codes: 9190 (CN=United States); 8302 (CN=Software and computer services); 8651 (CN=Computer industry); 7000 (CN=Marketing)

11/8/4 (Item 4 from file: 15)
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01569687 02-20676
USE FORMAT 7 OR 9 FOR FULL TEXT

Managing channel conflict
Word Count: 751 Length: 1 Pages
Jan 1998
Geographic Names: US

Descriptors: Insurance industry; Distribution channels; Diversification; Effects; Conflict; Market strategy; Internal public relations
Classification Codes: 9190 (CN=United States); 8200 (CN=Insurance industry); 7400 (CN=Distribution)

11/8/5 (Item 5 from file: 15)
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01416080 00067067
USE FORMAT 7 OR 9 FOR FULL TEXT

The realities of Web-based electronic commerce
Word Count: 4083 Length: 8 Pages

May/Jun 1997

Descriptors: Electronic commerce; Internet; Strategic management; Competitive advantage; Guidelines

Classification Codes: 5250 (CN=Telecommunications systems); 2310 (CN=Planning); 9150 (CN=Guidelines)

11/8/6 (Item 6 from file: 15)

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01340165 99-89561

USE FORMAT 7 OR 9 FOR FULL TEXT

Year in review part one: November 1995-February 1996

Word Count: 16507 Length: 26 Pages

Nov 18, 1996

Company Names:

Microsoft Corp (Duns: 08-146-6849 Ticker: MSFT)

IBM Corp (Duns: 00-136-8083 Ticker: IBM)

Apple Computer Inc (Duns: 06-070-4780 Ticker: AAPL)

Ingram Micro Inc

Netscape Communications Corp

Geographic Names: US

Descriptors: Year in review; High tech industries; Distribution channels; Trends; Internet; Market strategy;

Marketing agreements; Acquisitions & mergers; Manycompanies

Classification Codes: 9190 (CN=United States); 8302 (CN=Software and computer services); 8651 (CN=Computer industry); 7000 (CN=Marketing); 7400 (CN=Distribution); 2330 (CN=Acquisitions & mergers)

11/8/7 (Item 7 from file: 15)

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01244426 98-93821

USE FORMAT 7 OR 9 FOR FULL TEXT

Managing distribution channels

Word Count: 3212 Length: 8 Pages

Spring 1996

Company Names:

Goodyear Tire & Rubber Co (Duns: 00-446-7924 Ticker: GT)

Hallmark Cards Inc (Duns: 00-713-1113)

Microsoft Corp (Duns: 08-146-6849 Ticker: MSFT)

Motorola Inc (Duns: 00-132-5463 Ticker: MOT)

Descriptors: Manycompanies; Manycountries; Distribution channels; Distribution costs; Guidelines

Classification Codes: 7400 (CN=Distribution); 9180 (CN=International); 9150 (CN=Guidelines)

11/8/8 (Item 8 from file: 15)

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01153301 98-02696

USE FORMAT 7 OR 9 FOR FULL TEXT

Insurers won't succeed doing business as usual

Word Count: 21007 Length: 28 Pages

Jan 1996

Geographic Names: US

Descriptors: Insurance industry; Financial analysis; Trends; Industrywide conditions; Health care policy; Market segments; Banks in insurance; Strategic planning ; Statistical data

Classification Codes: 1110 (CN=Economic conditions & forecasts); 9190 (CN=United States); 9140 (CN=Statistical data); 8210 (CN=Life & health insurance); 3400 (CN=Investment analysis); 2310 (CN=Planning); 8100 (CN=Financial services industry); 1200 (CN=Social policy)

11/8/9 (Item 9 from file: 15)

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01128489 97-77883

USE FORMAT 7 OR 9 FOR FULL TEXT

Year in review - Part Two: May 1995-October 1995

Word Count: 13516 Length: 10 Pages

Nov 20, 1995

Company Names:

Microsoft Corp (Duns: 08-146-6849 Ticker: MSFT)

Novell Inc (Duns: 03-778-7298 Ticker: NOVL)

Compaq Computer Corp (Duns: 00-389-7733 Ticker: CPQ)

Intel Corp (Duns: 04-789-7855 Ticker: INTC)

IBM Corp (Duns: 00-136-8083 Ticker: IBM)

Geographic Names: US

Descriptors: Year in review; Value added resellers; Computer industry; Software industry ; Electronics industry; Court decisions; Competition; Corporate reorganization; Manycompanies

Classification Codes: 8302 (CN=Software and computer services); 8651 (CN=Computer industry); 8650 (CN=Electrical & electronics industries); 4330 (CN=Litigation); 7000 (CN=Marketing); 2320 (CN=Organizational structure); 9190 (CN=United States)

11/8/10 (Item 10 from file: 15)

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01114569 97-63963

USE FORMAT 7 OR 9 FOR FULL TEXT

The coming electronic commerce (r)evolution

Word Count: 3600 Length: 8 Pages

Nov/Dec 1995

Geographic Names: US

Descriptors: Information technology; Retailing industry; Distribution channels; Business forecasts; Changes; Corporate planning; Internet

Classification Codes: 5200 (CN=Communications & information management); 7400 (CN=Distribution); 2310 (CN=Planning); 8390 (CN=Retailing industry); 9190 (CN=United States)

11/8/11 (Item 11 from file: 15)

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00757293 94-06685

****USE FORMAT 7 OR 9 FOR FULL TEXT****

Strategic renewal in distribution

Word Count: 5417 Length: 10 Pages

1993

Geographic Names: US; Canada

Descriptors: Manycompanies; Wholesalers; Distribution channels; Growth; Studies

Classification Codes: 7400 (CN=Distribution); 8303 (CN=Wholesale industry); 9190 (CN=United States); 9140 (CN=Statistical data); 9172 (CN=Canada)

11/8/12 (Item 12 from file: 15)

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00646020 92-60960

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Rethinking Concept Foundations in Logistics Management

Word Count: 11399 Length: 35 Pages

1992

Descriptors: Logistics; Decision making; Distribution planning; Functions; Models

Classification Codes: 5160 (CN=Transportation)

11/8/13 (Item 1 from file: 9)

Business & Industry(R)

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01696769 Supplier Number: 24451284 (USE FORMAT 7 OR 9 FOR FULLTEXT)

Compaq's Prosignia Eases Way Into Retail

November 16, 1998

Word Count: 512

Company Names: COMPAQ COMPUTER CORP

Industry Names: Computer; Personal computers; Portable computers
Product Names: Servers (357105); Personal computers, except portable (357161); Portable computers (357165)
Concept Terms: Ad budget; All company; All product and service information; Product introduction
Marketing Terms: All media; Ad volume
Brand Names: Prosignia
Geographic Names: North America (NOAX); United States (USA)

11/8/14 (Item 2 from file: 9)
Business & Industry(R)
(c) 2008 The Gale Group. All rights reserved.
01327415 Supplier Number: 23984751 (USE FORMAT 7 OR 9 FOR FULLTEXT)
SunSoft, Ingram Micro to ink deal

August 04, 1997
Word Count: 295
Company Names: CYBERGUARD CORP; INGRAM MICRO INC; JAVASOFT; SUNSOFT INC (SUN MICROSYSTEMS INC); TECH DATA CORP
Industry Names: Computer; Network hardware and software; Software
Product Names: Computers and computer peripheral equipment and software-wholesale (504500); Prepackaged software (737200); Communications software packages, except networking (737251); Networking software packages (737255)
Concept Terms: All intellectual property; Distribution license
Geographic Names: North America (NOAX); United States (USA)

11/8/15 (Item 1 from file: 621)
Gale Group New Prod.Annou.(R)
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01615729 Supplier Number: 48332322 (USE FORMAT 7 FOR FULLTEXT)
Management Team Created To Direct New Distribution Entity; New Headquarters Location Announced

March 2 , 1998
Word Count: 417
Publisher Name: PR Newswire Association, Inc.
Company Names: *MicroAge Inc.
Event Names: *540 (Executive changes & profiles)
Geographic Names: *1USA (United States)
Product Names: *7370000 (Computer Services)
Industry Names: BUS (Business, General); BUSN (Any type of business)
NAICS Codes: 5415 (Computer Systems Design and Related Services)
Ticker Symbols: MICA

11/8/16 (Item 1 from file: 16)
Gale Group PROMT(R)
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06120469 Supplier Number: 53736141 (USE FORMAT 7 FOR FULLTEXT)

Cost-Effective Customer Service -- Businesses Rethink Their Supply Chains To Get Closer To Customers.(Company Business and Marketing)

Feb 8 , 1999

Word Count: 468

Publisher Name: CMP Publications, Inc.

Company Names: *BMG Entertainment; Elf Atochem North America Inc.

Event Names: *360 (Services information)

Geographic Names: *1USA (United States)

Product Names: *3652000 (Records & Tapes); 2800000 (Chemicals & Allied Products)

Industry Names: BUSN (Any type of business); CMPT (Computers and Office Automation); TELC (Telecommunications)

NAICS Codes: 51222 (Integrated Record Production/Distribution); 325 (Chemical Manufacturing)

Special Features: LOB; INDUSTRY; COMPANY

11/8/17 (Item 2 from file: 16)

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05955919 Supplier Number: 53223404 (USE FORMAT 7 FOR FULLTEXT)

Compaq's Prosignia eases way into retail.(Product Information)

Nov 16 , 1998

Word Count: 534

Publisher Name: CMP Publications, Inc.

Company Names: *Compaq Computer Corp.

Event Names: *240 (Marketing procedures)

Geographic Names: *1USA (United States)

Product Names: *3573120 (Microcomputers); 5734000 (Computer Stores)

Industry Names: BUSN (Any type of business); CMPT (Computers and Office Automation); RETL (Retailing)

NAICS Codes: 334111 (Electronic Computer Manufacturing); 44312 (Computer and Software Stores)

Ticker Symbols: CPQ

Trade Names: Compaq ProSignia (Intel-compatible system)

Special Features:

LOB; COMPANY

11/8/18 (Item 3 from file: 16)

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05739568 Supplier Number: 50219677 (USE FORMAT 7 FOR FULLTEXT)

Oracle Executives work to become conflict Busters -- If they fail, 'buckets' of resellers could pour into Microsoft's SQL Server 7.0

August 3 , 1998

Word Count: 548

Publisher Name: CMP Publications, Inc.
Company Names: *Oracle Corp.
Event Names: *220 (Strategy & planning); 240 (Marketing procedures)
Geographic Names: *1USA (United States)
Product Names: *7372000 (Computer Software)
Industry Names: BUSN (Any type of business); CMPT (Computers and Office Automation)
NAICS Codes: 51121 (Software Publishers)
Special Features: LOB; COMPANY

11/8/19 (Item 4 from file: 16)
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05340054 Supplier Number: 48124333 (USE FORMAT 7 FOR FULLTEXT)

Lexmark Laser Printers Edge Apple, HP In Unanimous Win: Apple's niche markets and HP's product quality can't beat VAR-friendly Lexmark in support and partnership
Nov 15 , 1997
Word Count: 1301
Publisher Name: CMP Publications, Inc.
Event Names: *353 (Product quality)
Geographic Names: *1USA (United States)
Product Names: *3573263 (Laser Printers)
Industry Names: BUSN (Any type of business); CMPT (Computers and Office Automation)
NAICS Codes: 334119 (Other Computer Peripheral Equipment Manufacturing)

11/8/20 (Item 5 from file: 16)
Gale Group PROMT(R)
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05288161 Supplier Number: 48053344 (USE FORMAT 7 FOR FULLTEXT)

A consistent Hewlett-Packard Dominates The Desktop -- With solid scores across the board, HP scores a decisive win over Compaq and IBM
Oct 15 , 1997
Word Count: 1458
Publisher Name: CMP Publications, Inc.
Company Names: *Hewlett-Packard Co.
Event Names: *350 (Product standards, safety, & recalls); 240 (Marketing procedures)
Geographic Names: *1USA (United States)
Product Names: *3573000 (Computers & Peripherals)
Industry Names: BUSN (Any type of business); CMPT (Computers and Office Automation)
NAICS Codes: 334111 (Electronic Computer Manufacturing)
Ticker Symbols: HWP
Special Features: LOB; COMPANY

11/8/21 (Item 6 from file: 16)

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05288145 Supplier Number: 48053328 (USE FORMAT 7 FOR FULLTEXT)

Artisoft Rises to the top Again On Support And Partnership: Channel-Friendly Artisoft manages to hold its own against leading contender SunSoft

Oct 15 , 1997

Word Count: 1380

Publisher Name: CMP Publications, Inc.

Company Names: *Artisoft Inc.; International Business Machines Corp.; Microsoft Corp.; Santa Cruz Operation Inc.; Sun Microsystems Inc.; SunSoft Inc.

Event Names: *240 (Marketing procedures)

Geographic Names: *1USA (United States)

Product Names: *7372610 (Network Operating Systems & Utilities)

Industry Names: BUSN (Any type of business); CMPT (Computers and Office Automation)

NAICS Codes: 51121 (Software Publishers)

Ticker Symbols: ASFT; IBM; MSFT; SCOC; SUNW

Special Features: COMPANY

11/8/22 (Item 7 from file: 16)

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05167090 Supplier Number: 47886475 (USE FORMAT 7 FOR FULLTEXT)

SunSoft, Ingram Micro to ink deal

August 4 , 1997

Word Count: 308

Publisher Name: CMP Publications, Inc.

Company Names: *Ingram Micro Inc.; SunSoft Inc.

Event Names: *360 (Services information); 240 (Marketing procedures)

Geographic Names: *1USA (United States)

Product Names: *7372701 (Value-Added Resellers); 7372000 (Computer Software)

Industry Names: BUSN (Any type of business); CMPT (Computers and Office Automation)

NAICS Codes: 541512 (Computer Systems Design Services); 51121 (Software Publishers)

Special Features: LOB; COMPANY

11/8/23 (Item 8 from file: 16)

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04686885 Supplier Number: 46898796 (USE FORMAT 7 FOR FULLTEXT)

Part One: November 1995 - February 1996. Part 2

Nov 18 , 1996

Word Count: 2507

Publisher Name: CMP Publications, Inc.

Company Names: *Acer America Corp.; Microsoft Corp.; Tech Data Corp.; Toshiba America Information Systems Inc.

Event Names: *600 (Market information - general); 220 (Strategy & planning)

Geographic Names: *1USA (United States)

Product Names: *7372400 (Applications Software); 3573120 (Microcomputers); 7372500 (Operating Systems & Utilities); 5081357 (Computers Wholesale)

Industry Names: BUSN (Any type of business); CMPT (Computers and Office Automation)

NAICS Codes: 51121 (Software Publishers); 334111 (Electronic Computer Manufacturing); 42143 (Computer and Computer Peripheral Equipment and Software Wholesalers)

Ticker Symbols: MSFT; TECO

Special Features: COMPANY

11/8/24 (Item 9 from file: 16)

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03598021 Supplier Number: 45064754 (USE FORMAT 7 FOR FULLTEXT)

SILICON GRAPHICS: A BANNER YEAR

Oct 15 , 1994

Word Count: 1045

Publisher Name: CMP Publications, Inc.

Company Names: *Silicon Graphics Inc.

Event Names: *220 (Strategy & planning)

Geographic Names: *1USA (United States)

Product Names: *3573000 (Computers & Peripherals)

Industry Names: BUSN (Any type of business); CMPT (Computers and Office Automation)

NAICS Codes: 334111 (Electronic Computer Manufacturing)

Ticker Symbols: SGI

Special Features: LOB; COMPANY

11/8/25 (Item 10 from file: 16)

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01467898 Supplier Number: 41773326

Shifting Product Emphasis in Telecom Distribution Channels: INTRODUCTION: DISTRIBUTION ISSUES:
Multiple Channel Membership, Servicing National Accounts

Jan , 1991

Publisher Name: Market Intelligence Research Co.

Company Names: *American Tel & Tel; Tandy Corp.

Event Names: *240 (Marketing procedures)

Geographic Names: *1USA (United States)

Product Names: *3661000 (Telecommunication Systems)
Industry Names: BUS (Business, General); BUSN (Any type of business)
NAICS Codes: 3342 (Communications Equipment Manufacturing)
Ticker Symbols: TAN
Special Features: LOB; COMPANY

11/8/26 (Item 1 from file: 148)
Gale Group Trade & Industry DB
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11586627 Supplier Number: 55503797 (USE FORMAT 7 OR 9 FOR FULL TEXT)
The great European multimedia gamble.

Summer , 1995
Word Count: 6320 Line Count: 00528
Industry Codes/Names: BUS Business, General; BUSN Any type of business
Descriptors: Cable television broadcasting industry--Europe; Telecommunications industry --Europe; Europe--
Business and industry
Product/Industry Names: 4800000 (Telecommunication Services)
Product/Industry Names: 4800 COMMUNICATION
NAICS Codes: 513 Broadcasting and Telecommunications
File Segment: TI File 148

11/8/27 (Item 2 from file: 148)
Gale Group Trade & Industry DB
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11586626 Supplier Number: 55503796 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Real profits from virtual communities.

Summer , 1995
Word Count: 4973 Line Count: 00410
Industry Codes/Names: BUS Business, General; BUSN Any type of business
Descriptors: Electronic commerce--Evaluation; Online services-- Evaluation
File Segment: TI File 148

11/8/28 (Item 3 from file: 148)
Gale Group Trade & Industry DB
(c)2008 The Gale Group. All rights reserved.
10411910 Supplier Number: 21041185 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Western Digital Drives Into Top Spot.(wins the storage category of the Annual Peripherals Excellence
awards) (Company Business and Marketing)

August 17 , 1998
Word Count: 2190 Line Count: 00173
Company Names: Western Digital Corp.--Achievements and awards

Industry Codes/Names: BUSN Any type of business; CMPT Computers and Office Automation
Descriptors: Computer peripherals industry--Achievements and awards; Disk drives-- Achievements and awards;
Value-added resellers--Surveys
Product/Industry Names: 3573215 (Computer Hard Disk Drives); 7372701 (Value-Added Resellers)
Product/Industry Names: 3572 Computer storage devices; 7373 Computer integrated systems design
Ticker Symbols: WDC
File Segment: CD File 275

11/8/29 (Item 4 from file: 148)
Gale Group Trade & Industry DB
(c)2008 The Gale Group. All rights reserved.
10362027 Supplier Number: 20984724 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Oracle Executives work to become conflict Busters -- If they fail, 'buckets' of resellers could pour into
Microsoft's SQL Server 7.0. (Product Information)

August 3 , 1998
Word Count: 572 Line Count: 00048
Company Names: Oracle Corp.--Marketing; Microsoft Corp.--Marketing
Industry Codes/Names: BUSN Any type of business; CMPT Computers and Office Automation
Descriptors: Database management systems--Marketing; Computer software industry-- Marketing
Product/Industry Names: 7372421 (DBMS)
Product/Industry Names: 7372 Prepackaged software
Ticker Symbols: ORCL; MSFT; ORCL; MSFT
Trade Names: Oracle8 8.0 (DBMS)--Marketing; Microsoft SQL Server 7.0 (DBMS)--Marketing
File Segment: CD File 275

11/8/30 (Item 5 from file: 148)
Gale Group Trade & Industry DB
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10196146 Supplier Number: 20583693 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Vendors Air Concerns Over EDI Sites.(Internet and Electronic Commerce Conference and Exposition)
(Industry Trend or Event)

May 11 , 1998
Word Count: 589 Line Count: 00049
Industry Codes/Names: BUSN Any type of business; CMPT Computers and Office Automation
Descriptors: Value-added resellers--Marketing; Retail industry--Marketing
Product/Industry Names: 7372701 (Value-Added Resellers)
Product/Industry Names: 7373 Computer integrated systems design
File Segment: CD File 275

11/8/31 (Item 6 from file: 148)
Gale Group Trade & Industry DB
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10169905 Supplier Number: 20352277 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Managing channel conflict. (distribution channels)(Column)

Dec , 1997

Word Count: 811 Line Count: 00074

Industry Codes/Names: BUSN Any type of business; INSR Insurance and Human Resources

Descriptors: Insurance industry--Distribution; Distribution of goods--Management

Product/Industry Names: 6411000 (Insurance Agents & Brokers); 9914500 (Distribution Channels)

Product/Industry Names: 6411 Insurance agents, brokers, & service

File Segment: TI File 148

11/8/32 (Item 7 from file: 148)

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10169553 Supplier Number: 20341537 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Channel conflict: when is it dangerous?

Summer , 1997

Word Count: 2556 Line Count: 00212

Special Features: photograph; table; chart; illustration

Industry Codes/Names: BUS Business, General; BUSN Any type of business

Descriptors: Distribution channels--Analysis; Distribution of goods--Analysis

Product/Industry Names: 9914500 (Distribution Channels)

File Segment: TI File 148

11/8/33 (Item 8 from file: 148)

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10007090 Supplier Number: 20218116 (USE FORMAT 7 OR 9 FOR FULL TEXT)

E-commerce. (includes related articles on electronic commerce) (part one)

Jan-Feb , 1998

Word Count: 3764 Line Count: 00319

Special Features: other; illustration

Industry Codes/Names: BUSN Any type of business; CMPT Computers and Office Automation

Descriptors: Electronic commerce--Analysis; Online services--Usage; Electronic data interchange--Analysis

Product/Industry Names: 7372640 (Electronic Commerce Software); 4811520 (Online Services)

Product/Industry Names: 7372 Prepackaged software; 4822 Telegraph & other communications

File Segment: TI File 148

11/8/34 (Item 9 from file: 148)
Gale Group Trade & Industry DB
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09927239 Supplier Number: 20053269 (USE FORMAT 7 OR 9 FOR FULL TEXT)
June 1997.(The Year in Review) (Industry Trend or Event)

Dec 1 , 1997
Word Count: 6986 Line Count: 00542

Special Features: photograph; table; illustration
Industry Codes/Names: BUSN Any type of business; CMPT Computers and Office Automation
Descriptors: Computer industry--1997; Computer software industry--1997; High technology industry--1997
Product/Industry Names: 7372000 (Computer Software); 3573000 (Computers & Peripherals)
Product/Industry Names: 7372 Prepackaged software; 3571 Electronic computers
File Segment: CD File 275

11/8/35 (Item 10 from file: 148)
Gale Group Trade & Industry DB
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09879235 Supplier Number: 19999961 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Lexmark laser printers edge Apple, HP in unanimous win. (APEX survey of network laser printers)
(Company Business and Marketing)

Nov 15 , 1997
Word Count: 1345 Line Count: 00121

Special Features: photograph; table; illustration
Company Names: Lexmark International Inc.--Products; Hewlett-Packard Co.--Products; Apple Computer Inc.--Products
Industry Codes/Names: BUSN Any type of business; CMPT Computers and Office Automation
Descriptors: Laser printers--Marketing; Computer printer industry--Products; Value-added resellers--Surveys
Product/Industry Names: 3573263 (Laser Printers)
Product/Industry Names: 3577 Computer peripheral equipment, not elsewhere classified
Ticker Symbols: L XK; HWP; AAPL; L XK; HWP; AAPL
File Segment: CD File 275

11/8/36 (Item 11 from file: 148)
Gale Group Trade & Industry DB
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09838129 Supplier Number: 19693831 (USE FORMAT 7 OR 9 FOR FULL TEXT)
The realities of Web-based electronic commerce. (World Wide Web)

May-June , 1997
Word Count: 4398 Line Count: 00358

Special Features: table; illustration
Industry Codes/Names: BUSN Any type of business
Descriptors: Electronic commerce--Analysis; Internet--Usage
File Segment: MC File 75

11/8/37 (Item 12 from file: 148)
Gale Group Trade & Industry DB
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09818351 Supplier Number: 19921869 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Artisoft rises to the top again on support and partnership issues.(VARBusiness 12th Annual Report Card)
(Industry Trend or Event)

Oct 15 , 1997
Word Count: 1411 Line Count: 00129

Special Features: photograph; table; illustration
Company Names: Artisoft Inc.--Marketing; SunSoft Inc.--Marketing; International Business Machines Corp.--Marketing
Industry Codes/Names: BUSN Any type of business; CMPT Computers and Office Automation
Descriptors: Value-added resellers--Surveys; Network operating systems--Marketing; Computer software industry--Marketing
Product/Industry Names: 7372610 (Network Operating Systems & Utilities); 7372701 (Value-Added Resellers)
Product/Industry Names: 7372 Prepackaged software; 7373 Computer integrated systems design
Ticker Symbols: ASFT; IBM; ASFT; IBM
File Segment: CD File 275

11/8/38 (Item 13 from file: 148)
Gale Group Trade & Industry DB
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09818315 Supplier Number: 19921833 (USE FORMAT 7 OR 9 FOR FULL TEXT)
A consistent Hewlett-Packard dominates the desktop. (VARBusiness 12th Annual Report Card) (Company Business and Marketing)

Oct 15 , 1997
Word Count: 1486 Line Count: 00131

Special Features: photograph; table; illustration
Company Names: Hewlett-Packard Co.--Surveys
Industry Codes/Names: BUSN Any type of business; CMPT Computers and Office Automation
Descriptors: Value-added resellers--Surveys; Computer industry--Surveys; Microcomputers --Distribution
Product/Industry Names: 3573120 (Microcomputers)
Product/Industry Names: 3571 Electronic computers
Ticker Symbols: HWP

File Segment: CD File 275

11/8/39 (Item 14 from file: 148)

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09120028 Supplier Number: 18884362 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Year in Review. (Nov to Feb 1996)(Special Fall Comdex Issue) (Industry Trend or Event)

Nov 18 , 1996

Word Count: 17658 Line Count: 01402

Special Features: illustration; photograph

Industry Codes/Names: CMPT Computers and Office Automation; BUSN Any type of business

Descriptors: Computers--History; Computer industry--History

Product/Industry Names: 3573000 (Computers & Auxiliary Equip)

Product/Industry Names: 3571 Electronic computers

File Segment: CD File 275

11/8/40 (Item 15 from file: 148)

Gale Group Trade & Industry DB

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08435788 Supplier Number: 17866325 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Insurers won't succeed doing business as usual.(Cover Story)

Jan , 1996

Word Count: 22310 Line Count: 01885

Special Features: illustration; graph

Industry Codes/Names: INSR Insurance and Human Resources

Descriptors: Insurance industry--Forecasts

Product/Industry Names: 6300000 (Insurance)

Product/Industry Names: 6300 INSURANCE CARRIERS

File Segment: TI File 148

11/8/41 (Item 16 from file: 148)

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08303152 Supplier Number: 17774074 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Year in review 1995. (computer industry) (part two, May 1995 - October 1995) (Industry Trend or Event)

Nov 20 , 1995

Word Count: 14582 Line Count: 01157

Special Features: illustration; photograph; table

Company Names: International Business Machines Corp.--Marketing; Intel Corp.--Marketing; Microsoft Corp.--Marketing

Industry Codes/Names: CMPT Computers and Office Automation

Descriptors: Computer industry--1995

Product/Industry Names: 3573000 (Computers & Auxiliary Equip)

Product/Industry Names: 3571 Electronic computers

Ticker Symbols: IBM; INTC; MSFT; IBM; INTC; MSFT

File Segment: CD File 275

11/8/42 (Item 17 from file: 148)

Gale Group Trade & Industry DB

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08266575 Supplier Number: 17556298 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Channel awakens to Win 95, services. (34 company profiles) (Part 2)(CRN Quarterly Industry Snapshot: Third Quarter 1995) (Company Financial Information)

Nov 6 , 1995

Word Count: 8265 Line Count: 00685

Special Features: illustration; graph

Company Names: International Business Machines Corp.--Finance; InaCom Corp.--Finance; Informix Software Inc.--Finance; Ingram Micro Inc.--Finance; Intel Corp.-- Finance; Intelligent Electronics Inc.--Finance; Macromedia Inc. (San Francisco, California)--Finance; Merisel Inc.--Finance; MicroAge Inc.-- Finance; Micrografx Inc.-- Finance; Micropolis Corp.--Finance; Microsoft Corp.--Finance; Motorola Inc.--Finance; NEC Technologies Inc.-- Finance; Netscape Communications Corp.--Finance; Novell Inc.--Finance; Oracle Corp. --Finance; Packard Bell Electronics Inc.--Finance; PictureTel Corp.-- Finance; Santa Cruz Operation Inc.--Finance; Seagate Technology Inc.- Finance; Silicon Graphics Inc.--Finance; Software Spectrum Inc.--Finance; Stream International Inc.--Finance; Sun Microsystems Inc.--Finance; Sybase Inc.--Finance; Symantec Corp.--Finance; 3Com Corp.--Finance; Tech Data Corp.--Finance; Toshiba America Information Systems Inc.--Finance; U.S. Robotics Inc.--Finance; Vanstar Corp.-- Finance

Industry Codes/Names: CMPT Computers and Office Automation

Descriptors: Computer industry--Finance; Value-added resellers--Finance; Distributors (Commerce)--Finance

Product/Industry Names: 3573115 (Microcomputers); 7372000 (Computer Software); 7370000 (Computer Services)

Product/Industry Names: 3571 Electronic computers; 7372 Prepackaged software; 7370 Computer and Data Processing Services

Ticker Symbols: IBM; INAC; INTC; INEL; MACR; MSEL; MICA; MGXI; MLIS; MSFT; MOT; NSCP; NOVL; ORCL; PCTL; SCOC; SEGT; SGI; SSPE; SUNW; SYBS; SYMC; COMS; TECD; USRX

File Segment: CD File 275

11/8/43 (Item 18 from file: 148)

Gale Group Trade & Industry DB

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07618285 Supplier Number: 16374731 (USE FORMAT 7 OR 9 FOR FULL TEXT)
Alphabetical listings. (telemarketing equipment manufacturers, value-added resellers, telemarketing service providers) (Buyers Guide)

Dec , 1994

Word Count: 32480 Line Count: 02687

Industry Codes/Names: ADV Advertising, Marketing and Public Relations

Descriptors: Telemarketing--Equipment and supplies; Telemarketing industry--Directories

Product/Industry Names: 7319700 (Telemarketing Services)

Product/Industry Names: 7389 Business services, not elsewhere classified

File Segment: TI File 148

11/8/44 (Item 19 from file: 148)

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04776309 Supplier Number: 09248377 (USE FORMAT 7 OR 9 FOR FULL TEXT)

Managing multiple channels. (combining direct and indirect sales channels)

July-August , 1990

Word Count: 7802 Line Count: 00663

Special Features: illustration; chart; table

Industry Codes/Names: BUS Business, General

Descriptors: Selling--Management; Distribution channels--Management

File Segment: MI File 47

? d s

Set	Items	Description
S1	61830652	S PD<19990317
S2	2150	S ((CHANNEL OR (SUPPLY(W)CHAIN)) (5N) (CONFLICT OR CONFLICTS) (10N) (ELIMINAT???? OR MINIMIZ??? OR REDUC?????))
S3	742	S S1 AND S2
S4	221	S S3 AND (ONLINE OR ON-LINE OR INTERNET OR (ON(W)LINE) OR E-COMMERCE OR (E(W)COMMERCE) OR ELECTRONIC(W)COMMERCE)
S5	15	S S4 AND (MANUFACTURER OR MANUFACTURERS OR SUPPLIER OR SUPPLIERS OR VENDOR OR VENDORS) AND (RETAILER OR RETAILERS OR MERCHANT OR MERCHANTS OR SELLER OR SELLERS OR E-TAILER OR E-TAILERS) AND (DISTRIBUTOR OR DISTRIBUTORS OR WHOLESALE OR WHOLESALE OR WHOLESELLER OR WHOLESELLERS)
S6	14	RD (unique items)

S7 31 S S4 AND (MANUFACTURER OR MANUFACTURERS OR SUPPLIER OR SUPPLIERS OR
 VENDOR OR VENDORS) AND (DEALER OR DEALERS OR RETAILER OR RETAILERS OR MERCHANT OR
 MERCHANTS OR SELLER OR SELLERS OR E-TAILER OR E-TAILERS) AND (BROKDER OR BROKERS OR
 DISTRIBUTOR OR DISTRIBUTORS OR WHOLESALER OR WHOLESALER OR WHOLESSELLER OR WHOLESSELLERS)

S8 923 S S1 AND (((CHANNEL OR (SUPPLY(W)CHAIN)) (5N) (CONFLICT???) (10N) (MANAG???)
 OR MANAGEMENT OR ELIMINAT???? OR MINIMIZ??? OR REDUC????? OR MITIGAT???)

S9 310 S S8 AND (ONLINE OR ON-LINE OR INTERNET OR (ON(W)LINE) OR E-COMMERCE OR
 (E(W)COMMERCE) OR ELECTRONIC(W)COMMERCE)

S10 52 S S9 AND (MANUFACTURER OR MANUFACTURERS OR SUPPLIER OR SUPPLIERS OR
 VENDOR OR VENDORS) AND (DEALER OR DEALERS OR RETAILER OR RETAILERS OR MERCHANT OR
 MERCHANTS OR SELLER OR SELLERS OR E-TAILER OR E-TAILERS) AND (BROKDER OR BROKERS OR
 DISTRIBUTOR OR DISTRIBUTORS OR WHOLESALER OR WHOLESALER OR WHOLESSELLER OR WHOLESSELLERS)

S11 44 RD (unique items)

? d s

Set	Items	Description
S1	61830652	S PD<19990317
S2	2150	S ((CHANNEL OR (SUPPLY(W)CHAIN)) (5N) (CONFLICT OR CONFLICTS) (10N) (ELIMINAT???? OR MINIMIZ??? OR REDUC?????))
S3	742	S S1 AND S2
S4	221	S S3 AND (ONLINE OR ON-LINE OR INTERNET OR (ON(W)LINE) OR E-COMMERCE OR (E(W)COMMERCE) OR ELECTRONIC(W)COMMERCE)
S5	15	S S4 AND (MANUFACTURER OR MANUFACTURERS OR SUPPLIER OR SUPPLIERS OR VENDOR OR VENDORS) AND (RETAILER OR RETAILERS OR MERCHANT OR MERCHANTS OR SELLER OR SELLERS OR E-TAILER OR E-TAILERS) AND (DISTRIBUTOR OR DISTRIBUTORS OR WHOLESALER OR WHOLESALER OR WHOLESSELLER OR WHOLESSELLERS)
S6	14	RD (unique items)
S7	31	S S4 AND (MANUFACTURER OR MANUFACTURERS OR SUPPLIER OR SUPPLIERS OR VENDOR OR VENDORS) AND (DEALER OR DEALERS OR RETAILER OR RETAILERS OR MERCHANT OR MERCHANTS OR SELLER OR SELLERS OR E-TAILER OR E-TAILERS) AND (BROKDER OR BROKERS OR DISTRIBUTOR OR DISTRIBUTORS OR WHOLESALER OR WHOLESALER OR WHOLESSELLER OR WHOLESSELLERS)
S8	923	S S1 AND (((CHANNEL OR (SUPPLY(W)CHAIN)) (5N) (CONFLICT???) (10N) (MANAG???) OR MANAGEMENT OR ELIMINAT???? OR MINIMIZ??? OR REDUC????? OR MITIGAT???)
S9	310	S S8 AND (ONLINE OR ON-LINE OR INTERNET OR (ON(W)LINE) OR E-COMMERCE OR (E(W)COMMERCE) OR ELECTRONIC(W)COMMERCE)
S10	52	S S9 AND (MANUFACTURER OR MANUFACTURERS OR SUPPLIER OR SUPPLIERS OR VENDOR OR VENDORS) AND (DEALER OR DEALERS OR RETAILER OR RETAILERS OR MERCHANT OR MERCHANTS OR SELLER OR SELLERS OR E-TAILER OR E-TAILERS) AND (BROKDER OR BROKERS OR DISTRIBUTOR OR DISTRIBUTORS OR WHOLESALER OR WHOLESALER OR WHOLESSELLER OR WHOLESSELLERS)
S11	44	RD (unique items)

? d s

Set	Items	Description
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same set of customers. When this happens, channel conflict is virtually guaranteed. Such conflict almost invariably finds its way back to the manufacturer.

Conflict comes in many forms. Some is innocuous - merely the necessary friction of a competitive business environment. Some is actually positive for the manufacturer, forcing out-of-date or uneconomic players to adapt or perish. But some is truly dangerous, capable of undermining the economics of even the best product.

Dangerous conflict generally occurs when one channel targets customer segments already served by an existing channel. This leads to such a deterioration of channel economics that the threatened channel either retaliates against the manufacturer or simply stops selling its product. In either case, the manufacturer suffers.

The stakes can be high. Consider a few examples from the United States. Hill's Science Diet pet food lost a great deal of support in pet shops and feed stores as a result of the company's experiments with a "store within a store" pet shop concept in the competing grocery channel. In the auto market, ATK, the dominant seller of replacement engines for Japanese cars, lost its virtual monopoly when it attempted to undercut distributors and sell direct to individual mechanics and installers.

Quaker Oats' recent \$1.4 billion writeoff from the divestiture of its Snapple business was caused in part by channel conflict. Quaker had planned to consolidate its highly efficient grocery channel supporting the Gatorade brand with Snapple's channels for reaching convenience stores. Snapple distributors were supposed to focus on delivering small quantities of both brands to convenience store accounts while Gatorade's warehouse delivery channel handled larger orders to grocery chains and major accounts, leveraging Quaker's established strength in this area.

However, the strategy backfired. As Quaker suggested moving larger Snapple accounts to Gatorade's delivery system, Snapple's distributors revolted. They saw the value of their Snapple business as an exclusive geographic franchise that the split channel strategy would undermine. Several Snapple distributors took legal action against Quaker. The company ultimately backed down, but the dispute had created a considerable distraction at a time when competition from Arizona and Nantucket Nectars was intensifying.

Identifying a threat

While it is clear that some channel conflict can be devastating, many manufacturers have a hard time figuring out exactly which conflicts will pose a threat. We believe the key to spotting dangers ahead lies in answering four simple questions:

First, are the channels really attempting to serve the same end users? What may look like a conflict is sometimes an opportunity for growth as a new channel reaches a market that was previously unserved. When Coca-Cola installed its first vending machines in Japan, for instance, retailers objected. However, the company succeeded in showing that

while the vending machines did indeed serve the same customers, they did so on different occasions and offered different value propositions. It was able to counter the retailers' noisy complaints with economic realities. In a similar way, companies like Charles Schwab are using online channels to satisfy latent consumer demand for new approaches to personal financial services, such as low prices combined with abundant,

readily accessible information for the "do-it-yourself" customer segment.

Second, do channels mistakenly believe they are competing when in fact they are benefiting from each other's actions? New channels sometimes appear to be in conflict with existing ones when in reality they are expanding product usage or building brand support. Nike, for instance, has forward-integrated into NikeTown flagship stores that have enhanced brand awareness and prestige and given the company more control over brand image. Though competing athletics stores balked at first, the new store is thought to have boosted sales across all channels.

The collaboration of publishers with new Internet bookseller Amazon.com to enable books to be sold on line and reduce return rates has forced category killers like Borders and Barnes & Noble to enter the online arena. Although it is still too early to tell, this strategy may expand the market for books as consumers enjoy easier access to the product and use tools such as EYES, Amazon's browser, to obtain additional information on new titles.

In insurance, Progressive Auto Insurance has successfully introduced direct telephone sales alongside its agency channel. Auto-Pro provides a 24-hour referral service to agents as part of the service. Avon appears to be following a similar strategy in cosmetics: its soon to be launched Internet site will permit both direct transactions and referrals to Avon sales representatives. We believe that efforts like these will actually enhance sales in other channels, not cannibalize them.

Third, is the deteriorating profitability of a griping player genuinely the result of another channel's encroachment? Poor operations, not conflict, may be the cause of a decline in a channel's competitiveness. When a weak operator is the only voice complaining about conflict, manufacturers should assess the likelihood that its business will fail and estimate how much revenue they would lose if it did. They should then decide whether to support the player more actively or develop a migration strategy to replace lost profits by using other, more viable intermediaries within the channel.

Selecting the right partner within a channel is often as important a strategic decision as determining which channels to use. To avoid becoming dependent on unsuitable partners, manufacturers should monitor the operations of channel partners and work to develop their skills and capabilities. They may also find it helpful to switch partners from time to time.

Fourth, will a channel's decline necessarily harm a manufacturer's profits? Channels sometimes deteriorate because of economic shifts and changes in consumer preferences. A case in point is the decline of uneconomic medium-sized cigarette distributors and jobbers in the United States during the 1970s and 1980s. These companies were relics of an era of highly fragmented sales and distribution.

Cigarette brand leaders refused to prop them up, putting their might behind larger, more economic players instead.

More recently, large pharmaceutical companies and their distributors have refused to reduce their profit margins to support independent pharmacists. Instead, they have chosen to favor HMOs and mail-order pharmacies with cheaper prices for bulk orders so as to develop relationships with these new and increasingly important channels. Independent drugstores demanding equal treatment launched a federal court antitrust suit that is yet to be resolved.

If a channel is declining because of the emergence of a competing channel that consumers prefer, the manufacturer's strategic priority must be to align with the new channel. The trick is to do so without provoking the wrath of the declining channel, especially if it continues to carry significant volume. In the United States, specialty pet food producers are actively aligning with two emerging category killers, PETSMART and Petco, while simultaneously supporting the economics of small pet shops. These latter players are clearly in decline, but still represent 60 percent of specialty pet food volume. Similarly, when Goodyear entered mass merchant channels, it kept independent dealers happy by introducing specially designed programs to drive share growth in the tire replacement market.

When to act

Answering these four questions gives manufacturers a better understanding of which channel conflicts are truly dangerous. If a conflict is destructive and a substantial amount of current or future volume passes through the offended channel, manufacturers must act to alleviate the situation (TABULAR DATA FOR EXHIBIT 1 OMITTED). In making a judgment, manufacturers should compare the cost of preserving the volume and related profits of the existing channel with the economic benefit of entering a new channel, taking into account the likelihood of retaliation and the costs it might involve.

Scenario planning or game theory can be used to predict channel responses and to estimate the cost of taking no action. However, as a general rule, a channel in distress that is not in decline and carries more than 10 to 15 percent of volume and/or profit needs attention.

Averting channel disaster

If a manufacturer determines that channel conflict is potentially dangerous, the next question is exactly what to do about it. Exhibit 2 outlines a variety of ways to tackle channel conflict at different stages in its development. If conflict has recently arisen between channels focused on the same segments, a supplier might respond by introducing separate products or brands tailored to each channel.

Black & Decker, for instance, offers three different ranges via three different channels. For casual do-it-yourselfers, it markets the Black & Decker range through K-Mart and similar outlets. The needs of serious enthusiasts are met by the Quantum brand, introduced in 1993 and stocked by The Home Depot. Finally, DeWalt products, launched back in 1991, are designed for the professional contractor or builder who purchases from trade

dealers.

Similarly, Kendall-Jackson now offers wine sales on the Internet in 13 of the 50 American states. The wines sold on line, such as Artisans & Estates, are rarely carried by K-J's retail channels, which stock more popular brands such as Vintner's Reserve and Grand Reserve. The company also prices its Internet offerings at the high end of street prices to avoid channel conflict, and adds value by providing guidance for prospective buyers. Its Web site includes over 150 pages of information targeted at novice, intermediate, and advanced wine lovers.

Another company using a differentiated brand strategy to serve multiple segments simultaneously is Levi Strauss. It targets Britannia jeans and Levi branded casual wear to moderate-income families via discount chains such as Wal-Mart and Target, while aiming Dockers and Silver Tab clothing at fashion-conscious young adults who shop in department stores and specialty retailers. Young professionals in search of business casual wear are catered for by Slates, on sale in Macy's, Bloomingdale's, and other upmarket department stores, while at the opposite end of the scale, bargain hunters can find overstocks and seasonal, discontinued, or damaged merchandise from all ranges by shopping in Levi's own outlets.

Alternatively, a manufacturer can create the illusion of differentiation by using different names and numbers for the same items and introducing minor product modifications. In the mattress industry, for example, major suppliers offer similar or identical products through different channels under different names. Customers are confused by what appear to be hundreds of different models - so much so, in fact, that savvy retailers compile lists of comparable products as sales tools.

Similarly, consumer electronics companies sometimes allocate different model numbers to the same product in different channels. However, this approach may now be losing ground. Rather than relying on model numbers, consumers are increasingly using buying guides (many of them available on the Internet) to make objective comparisons of features and prices.

Another approach manufacturers might adopt is to divide channel roles so that individual channels are confined to performing specific functions in the value delivery chain. That could mean allocating exclusive territories, or simply improving the definition and enforcement of roles and terms within a channel, as copier manufacturers such as Kodak did to settle the war between value-added suppliers and brokers.

Manufacturers could also consider improving the economics of a declining channel, which often improves its performance at the same time. They might, for instance, offer rebates if an intermediary satisfies certain requirements for value-added service, or adjust margins between products to reflect the services offered by distributors.

In 1992, GE's appliance division strengthened its dealer network and retail business by introducing extensive support programs to help dealers and builders remain competitive. It adopted a two-tier approach. On the one hand, it offered its dealers similar purchase discounts to those received by large retailers, coupled with financial advice and inventory system support. On the other, it provided capital in the form of favorable loan programs to help dealers finance the remodeling of their stores. As a result, the GE division

expanded its market share from 27 percent in 1992 to 30 percent in 1996, despite intense competition. In a similar vein, Sears offers appliance dealers in rural areas financing, systems support, and help in managing accounting and inventory.

If overlap and falling channel profits are unavoidable, manufacturers must assess whether they can withstand the retaliation of their channel. Often, though, a channel will be reluctant to retaliate because retaliation would hurt it more than the conflict does. This is

usually the case when it is the manufacturer rather than the channel that really owns the customer. Leading consumer goods companies may also be able to leverage their powerful brands against a channel to prevent retaliation, as Procter & Gamble did when the new club channel emerged and took volume from grocery stores.

Alternatively, a supplier can accept that a channel will react, but limit the consequences by accelerating the migration of volume to a competing channel. Airlines have pursued this approach by encouraging a shift in sales volume from costly agency networks to direct channels and ticketless travel options.

In a few contentious cases, manufacturers have had no choice but to back down. IBM's PC group took this path when its attempts to sell direct were met with vehement objections from its distributor network. The problem of how to go direct remains unresolved, but the hemorrhaging of IBM's sales and market share has been slowed.

When Bass Ale piloted a home delivery service in the United Kingdom in November 1995, cash-and-carry warehouses and convenience stores protested, fearing they would lose business. Nurdin & Peacock, a leading cash-and-carry operator selling to independent retailers, withdrew ten Bass beers from its shelves and encouraged its customers to avoid Bass products. Bass abandoned the pilot.

Channel conflict is inevitable, but not all conflicts are equally dangerous. Understanding a conflict's source and its true gravity lies at the core of good channel management. Genuinely destructive conflict is rarer than most companies suppose. The best manufacturers recognize destructive channel conflict quickly, rethink their channel strategies, and nip conflict in the bud. Less sophisticated players either overreact to minor conflict or, fearful of destabilizing their channel relationships, become paralyzed and fail to act at all.

Christine Bucklin and Pamela Thomas-Graham are principals in McKinsey's Los Angeles and New York offices, respectively. Liz Webster is a consultant in the Chicago office.

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Estimated Cost Summary

Project		Client		Charge Code		Searcher		Job		Service Code	User Number
						Rob Pond				51	264751
Date		Time		SessionID		Subsession		Subaccount			
05/20/2008		17:00:30		147		3					
Data Base	Dial Units	Access Charge	Print Credit	Types	Prints	Report	Rank	Links	CSS	Total	
15	4.1300	23.04	0.00	4.35	0.00	0.00	0.00	0.00	0.00	27.39	
9	2.4610	13.73	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.73	
610	1.6640	1.73	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.73	
810	1.2310	1.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.28	
275	1.6090	8.98	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.98	
624	1.1500	6.71	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.71	
621	3.3140	18.49	0.00	0.00	0.00	0.00	0.00	0.00	0.00	18.49	
636	3.1140	17.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	17.37	
613	1.9640	2.04	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.04	
813	1.4040	1.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.46	
16	8.6330	48.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	48.17	
160	1.2020	6.71	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.71	
634	0.8180	0.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.85	
148	13.9520	77.85	0.00	3.79	0.00	0.00	0.00	0.00	0.00	81.64	
20	25.9380	32.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	32.42	
35	0.6260	2.64	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.64	
583	1.7100	5.95	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.95	
65	0.3040	1.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.30	
2	2.3640	25.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	25.30	
474	1.7490	6.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.37	
475	0.4870	1.77	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.77	
99	0.6010	2.94	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.94	
256	0.0780	0.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.42	
348	8.6740	48.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	48.40	
349	7.6250	37.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00	37.36	
347	4.8050	54.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00	54.25	
635	2.5620	14.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14.30	

570	1.3810	7.82	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.82
387	0.5990	0.62	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.62
471	2.8080	2.92	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.92
492	1.3520	1.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.41
494	1.2860	1.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.34

631	1.4970	1.56	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.56
633	1.0780	1.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.12
638	1.1730	1.22	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.22
640	0.7520	0.78	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.78
641	0.7680	0.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.80
702	1.4410	1.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.50
703	0.5370	0.56	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.56
704	1.2410	1.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.29
713	1.1090	1.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.15
714	0.8630	0.90	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.90
715	0.3040	0.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.32
725	0.2480	0.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26
735	1.0840	1.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.13
477	0.3900	0.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41
710	1.7550	1.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.83
711	1.0800	1.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.12
756	0.3960	0.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41
757	1.6770	1.74	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.74
47	3.3740	18.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	18.83
Sub Totals	132.3620	\$512.87	\$0.00	\$8.14	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$521.01
Session Totals	132.7480	\$513.04		Telecom	\$38.53					\$559.70

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- French Patents (File 371)
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- WIPO/PCT Patents Fulltext (File 349)
- TRADEMARKSCAN - U.S. Federal (File 226)

DialogLink 5 Release Notes

New features available in the latest release of DialogLink 5 (August 2006)

- Ability to resize images for easier incorporation into DialogLink Reports
- New settings allow users to be prompted to save Dialog search sessions in the format of their choice (Microsoft Word, RTF, PDF, HTML, or TEXT)

- Ability to set up Dialog Alerts by Chemical Structures and the addition of Index Chemicus as a structure searchable database
- Support for connections to STN Germany and STN Japan services

Show Preferences for details

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Connecting to Rob Pond - Dialog - 264751

Connected to Dialog via SMS002002061

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**File 148: The CURRENT feature is not working in File 148. See HELP NEWS148.*

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10196146 Supplier Number: 20583693 (THIS IS THE FULL TEXT)

Vendors Air Concerns Over EDI Sites.(Internet and Electronic Commerce Conference and Exposition)
(Industry Trend or Event)

Jastrow, David

Computer Reseller News , n788 , p45(1)

May 11 , 1998

Text:

New York -- How can manufacturers open a virtual store on the Internet without alienating VARs and distributors?

The answer is a mixed one. Vendors acknowledge that buying habits are changing, while at the same time they say they appreciate the value of channel partners.

That was the conclusion drawn from statements made at a panel discussion at the fourth annual Internet & Electronic Commerce Conference and Exposition, held here. The session, titled "Channel Conflict: Sell Direct and Lose Your Distributors?" allowed vendors to discuss the concerns they have in setting up electronic-data-interchange sites while simultaneously protecting channel relationships.

"The channel conflict piece is not going to go away," said Spencer DeShields, manager of strategic business development for Texas Instruments Inc.'s semiconductor group. "The big companies have to focus more on how they improve and enhance what they're doing with the innovation of electronic commerce and the Internet without tearing down and rebuilding that formal business structure."

During the discussion, DeShields said that while the Internet has changed the rules and allowed competitors to provide a lot of the same products offered by the Dallas-based vendor, it still plans to sell all product through distributors.

"Distributors are part of our environment that we cannot be without," he said. "We cannot be all over the world providing distribution and logistics to the entire global community."

Other panel members planned to make adjustments to meet the needs of consumers, particularly for the small-office/home-office market. Pioneer Electronics Inc., Cleveland, plans to sell peripheral items direct to customers over the Internet while continuing to sell its flagship products through the channel.

In addition, the vendor expects to sell a new product category direct from its North American Web site starting in September of this year, said Mark Smith, vice president of new business for Pioneer. He declined to reveal the product line but said it is sold through one of the company's subsidiaries in Asia.

"Right now, we have no intent to sell our mainline products on the Internet and the reason is because we would have severe channel conflict," Smith said. "We know from our customer polls that they want to buy Pioneer product direct from us, so we can either ignore that or find a way to get the customers what they want."

Smith said the strategy is a major concern for Pioneer product dealers, especially small ones. He said that looking ahead, he expects the line between manufacturers and retailers to blur.

"There are going to be more conflicts coming down the road," Smith said. "Our sales team is really concerned that we are going to disintermediate a lot of our small dealers, and that's why we have no plans to sell broad-line products (over the Internet)."

Communication is crucial for vendors concerned about channel conflict, said Rich Nardi, electronic-commerce consultant for New York-based KPMG Peat Marwick LLP. Many of his clients have delayed putting up EDI sites until seeing the problems encountered by competitors.

"They were proactive to the channel, asking them what kinds of things they could do to work better with them," Nardi said. "Instead of pushing something to the channel, they collaboratively worked with them to get feedback and figure out the right business model, so it makes sense both for the channel and the manufacturer."

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06120469 Supplier Number: 53736141 (THIS IS THE FULLTEXT)

Cost-Effective Customer Service -- Businesses Rethink Their Supply Chains To Get Closer To Customers.(Company Business and Marketing)

Stahl, Stephanie

InformationWeek , p ER14(1)

Feb 8 , 1999

Text:

Customers once expected low prices and good service.Today, they demand low prices and outstanding service. But finding the right technologies to let you get closer to your customer while remaining competitive isn't so simple. Such challenges force companies to rethink their supply chains and redefine customer ties.

Just how far are companies willing to go to provide more information and more access to customers and suppliers in their value chains?For Federal Express Corp., automated shipments and online status queries from customers

save its couriers a tremendous amount of time and extra paper handling. "As Internet usage has exploded the online population, we have a natural means of reaching more and more customers this way," says Rob Carter, chief technologist at FDX Corp., FedEx's parent company.

On the other hand, the music industry has never been particularly close to customers. "Our understanding of the consumer has always been one step removed," says Scott Dinsdale, CIO for BMG Entertainment North America. The music retailer has provided the direct link to the customer. But BMG is finding it necessary to change its relationship with customers, and has created several new Web sites to close the gap. One site aggregates information about all BMG's artists. The site helps BMG better understand and influence buying behaviors. Information BMG gathers could, for example, influence the timing of a new release.

Such direct contact with customers has caused BMG's relationship with its retail customers to fundamentally change. In some cases, it has caused channel conflicts that BMG has to manage on a regular basis. But while it may sound like a classic case of disintermediation, the traditional retailers are less concerned about BMG's direct links to customers than they are about new entrants to the market, such as CDnow and Amazon.com,

whose core business is driven by Web technology.

For Elf Atochem North America Inc., which sells agricultural chemicals, electronic business lets the company make sure it's giving customers the information they want in the way they want it. Providing material data sheets on the Internet and accepting orders online or through E-mail make it easier to get closer to customers and to add value. "It allows us to take commodities and treat them like specialties by adding a service component," says Elf Atochem CIO Bob Rubin.

But Elf Atochem struggles with the idea of eliminating distributors. In some cases, it may help the company get closer to its customers. In other instances, cutting distributors in areas in which the company isn't as efficient is not practical. The key is finding the right balance that will make the company "lean and friendly," Rubin says. "There is a tremendous emphasis on ensuring that such decisions will have an actual bottom-line return."

Stephanie Stahl is executive editor of InformationWeek

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